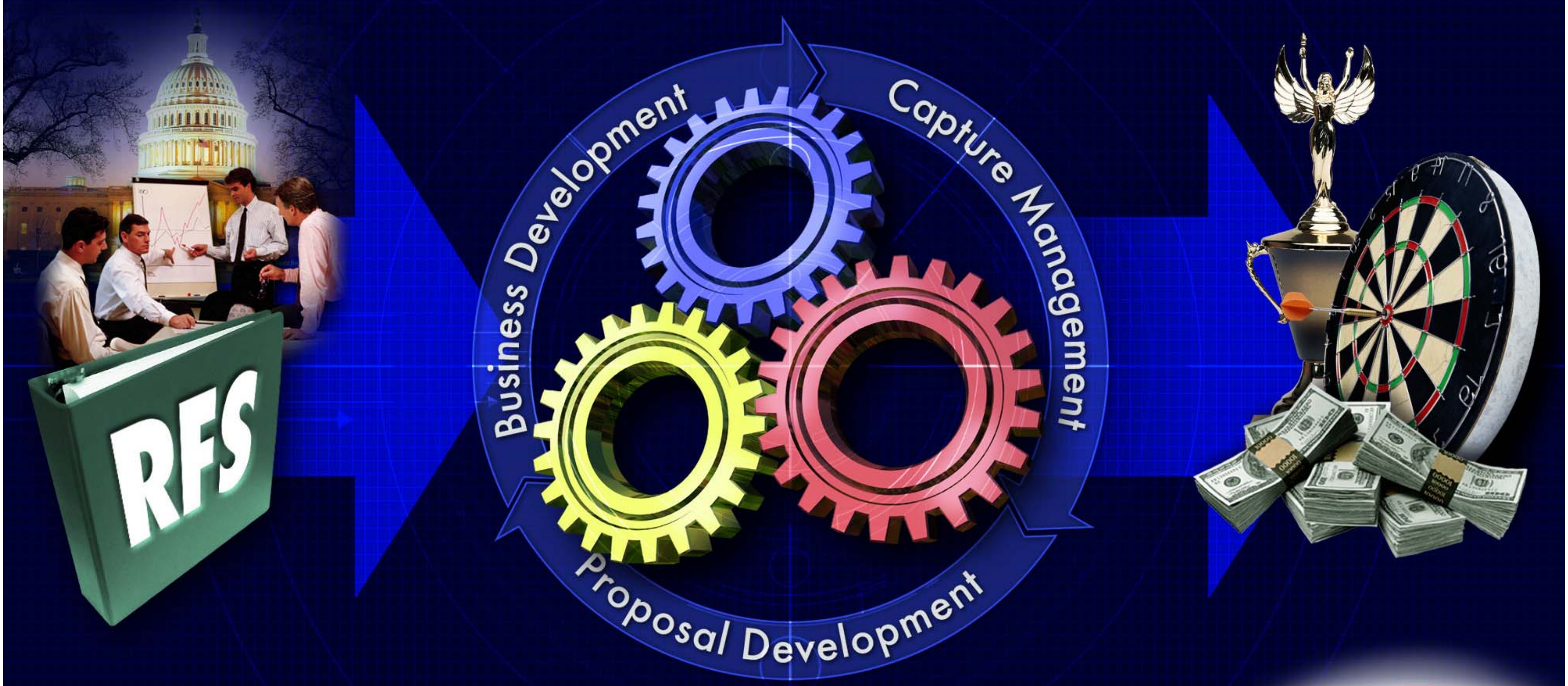
U.S. Department of Energy

7th Annual Small Business Conference

Seattle, Washington
June 27–30, 2006

RSIS®
RS Information Systems, Inc.

Developing the Winning Approach


RFS
Business Development
Capture Management
Proposal Development

June 27–30, 2006

RSIS®

Real Live Elevator Speech

Developing the Winning Approach

Business Development

Knowledge from Chuck Sharrocks, RSIS PM

Marketing intelligence

From storyboarding sessions

From RFS

TEAM RSIS will work in a trust-based partnership with DOE towards a common business and mission focus. Everything about our management solution for the DOE ITISS program has been geared to mitigate risk, support organizational change, and optimize return on investment (ROI) of all enterprise assets as we proceed together to stabilize, optimize, and transform our environment. We view ourselves as a best-value resource partner to DOE for managing programmatic and departmental mission success. In maximizing DOE's ROI on IT assets and capital investments, and in supporting DOE's critical role in federal e-Government, we bring the Agency a WIN/WIN solution at both the enterprise and project levels.

From RFS

Knowledge from incumbent contractors (our Teammates)

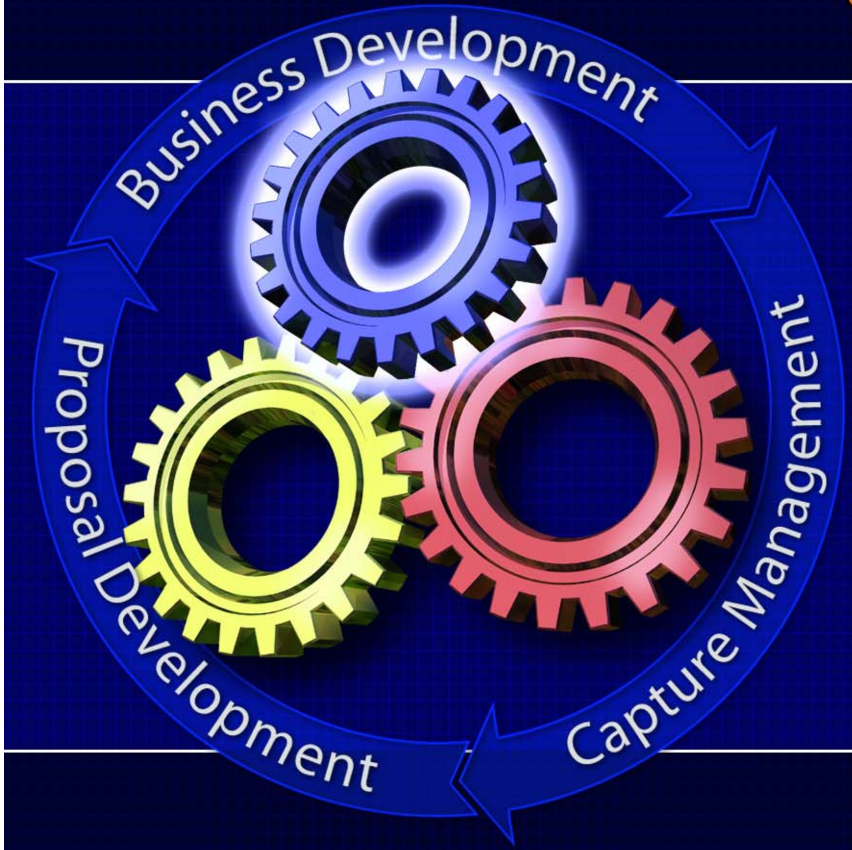
Marketing intelligence

From Dave Tyma, DOE CO Industry day/Pre-Proposal Conference

Sensitivity to OCIO and Program Offices

Fine threads in the storyline

Developing the Winning Approach

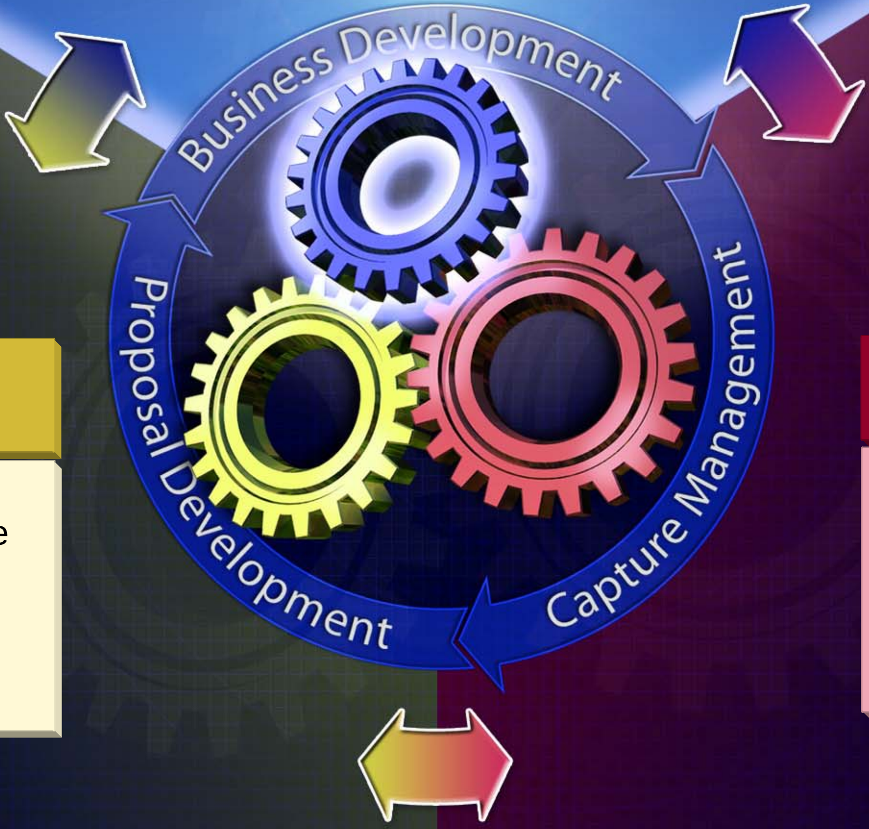

Business Development
Capture Management
Proposal Development

Business Development

Business Development

Business Development

- Marketing Intelligence Gathering
- Knowing Customer Better than Anyone
- Making Sure You Bid the Right Opportunities


Business Development
Proposal Development
Capture Management

Proposal Management

- Driving the Solutions into the Documents

Capture Management

- Solution Development
- Resource Management in Support of Opportunity

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On the critical path

Quotable Quotes—On Winning

- The most important factor in winning is COMMITMENT—eating, sleeping, thinking, breathing, winning the opportunity
- Winning isn't everything, it's the only thing!
- Compliance is a necessary *but not sufficient* condition for winning
- Assume one or more of our competitors is really good
- On a given opportunity, there are a few ways to win, and a few thousand ways to lose—it's easy to find the ways to lose
- Transactions are personal—people buy from people
- We are not competing against the RFP

Business Development

Small Business vs. Large Business Environments

Small Business Procurements

(Set asides, GWACs)

SB Prime
[SB, 8(a), WO, VO, SDVO, HUBZone]
[Size Standard, NAICS Code]

Subcontractor(s)
[SB or LB]

Large Business Procurements

(Full & Open, GWACs)

Prime
[Usually LB]

SB Subcontracting Requirement
[Minimum Labor Workshare]
[SB Type(s), Size Standard, NAICS Code]

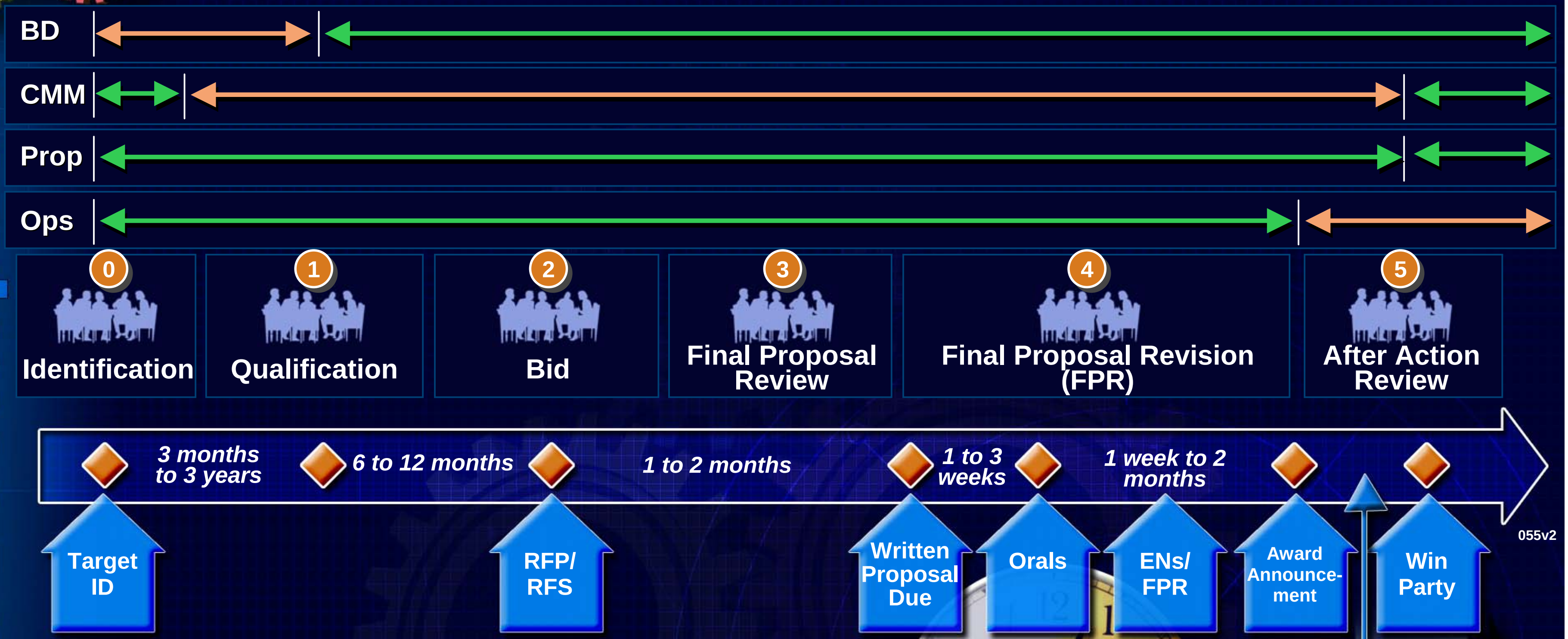
Value-added Subcontractor
[SB or LB]

We must prepare for, and win in, the LB World!

BD Lifecycle—QOP 63-01 (ISO 9001:2000) Milestones & Timeline

Developing the Winning Approach

Business Development



BD
CMM
Prop
Ops
0
Identification
1
Qualification
2
Bid
3
Final Proposal Review
4
Final Proposal Revision (FPR)
5
After Action Review
3 months to 3 years
6 to 12 months
1 to 2 months
1 to 3 weeks
1 week to 2 months
Target ID
RFP/ RFS
Written Proposal Due
Orals
ENs/ FPR
Award Announcement
Win Party
055v2

Customer Debrief

Start Early. . .
Do It Right

① QOP 63-01 Milestone

BAC Review

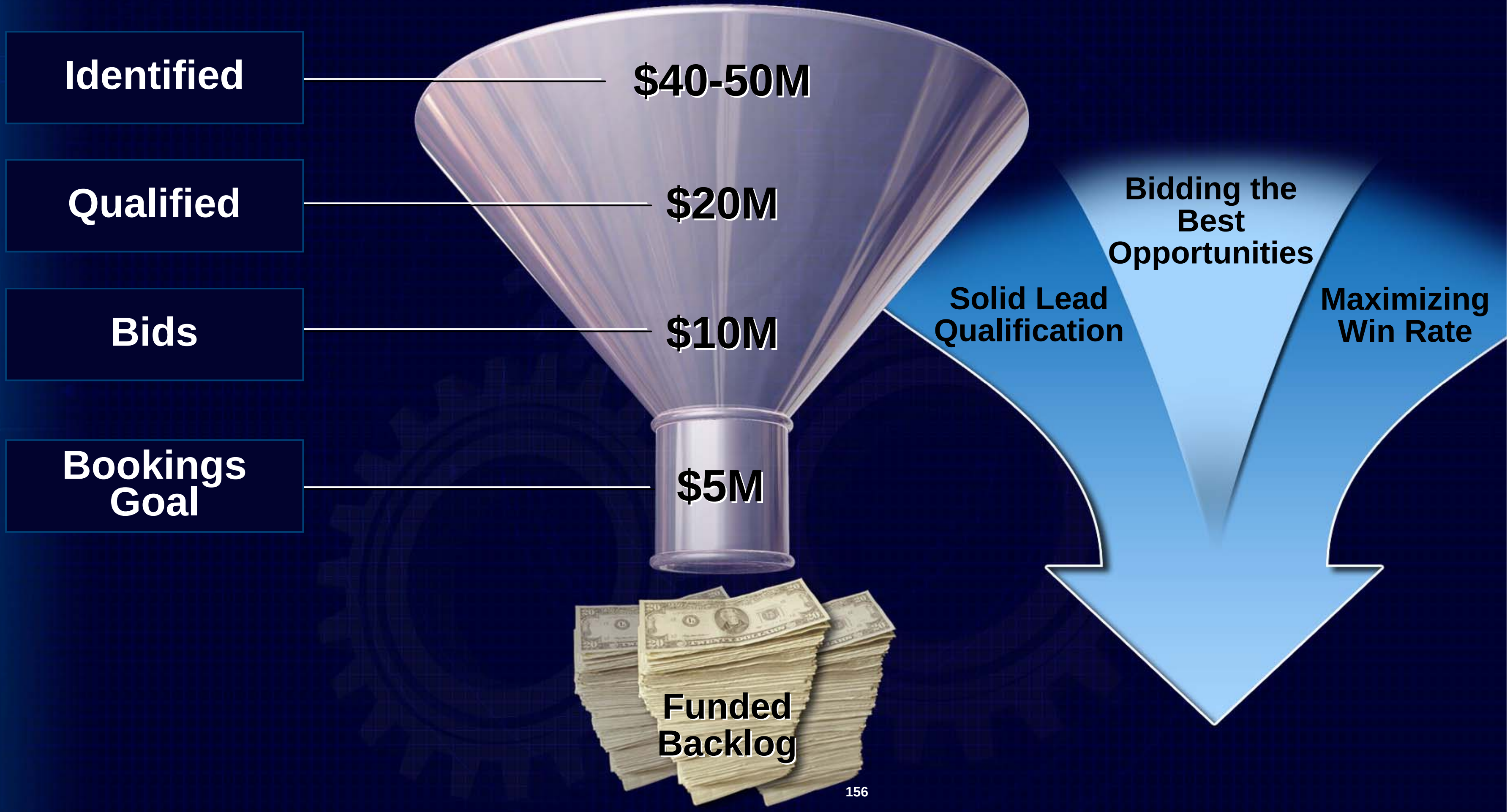
⟷ Lead

⟷ Support

BD Lifecycle—Business Development Funnel

Developing the Winning Approach

Business Development



Identified — $40-50M

Qualified — $20M

Bids — $10M

Bookings Goal — $5M

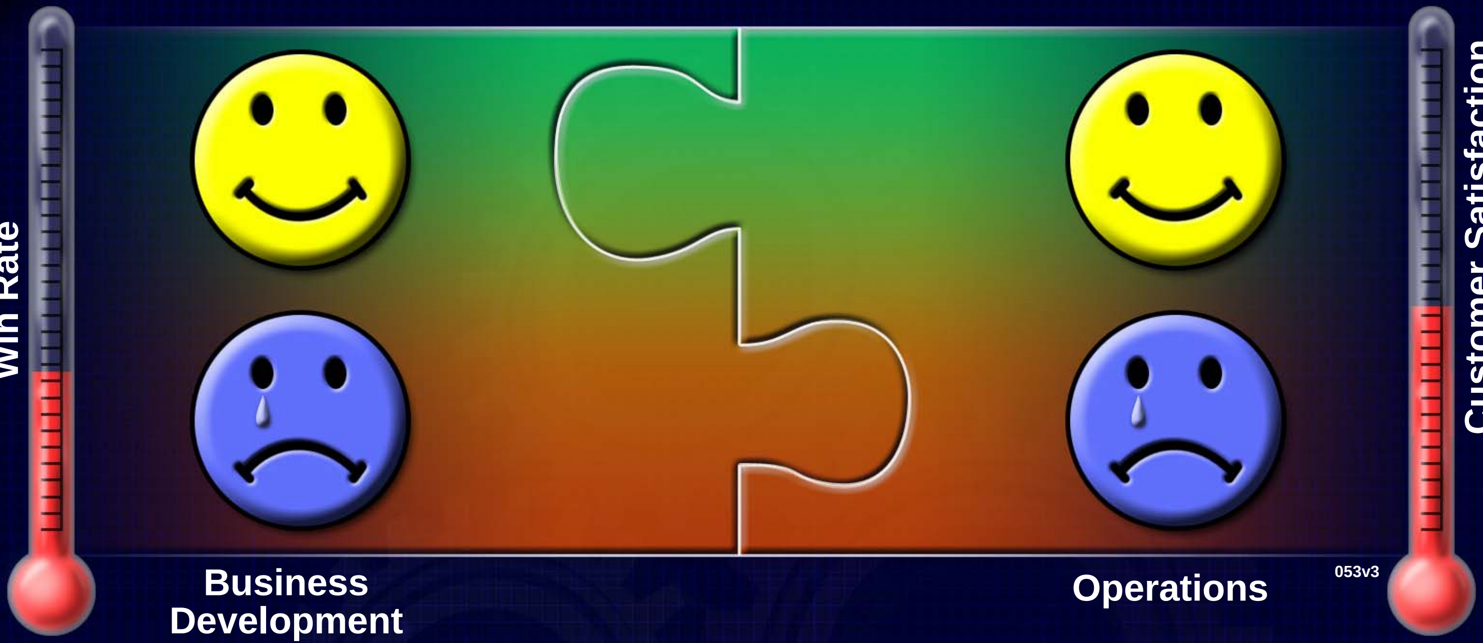
Funded Backlog

Solid Lead Qualification

Bidding the Best Opportunities

Maximizing Win Rate

BD Lifecycle—Winning and Customer Satisfaction


Win Rate
Customer Satisfaction
Business Development
Operations
053v3

“Past performance (satisfied customers) is your pot of gold.”

Neal Fox
Former Assistant Commissioner
Office of Commercial Acquisition
GSA Federal Supply Services

Business development and operations are “joined at the hip” in winning!

Business Development

Business Development Roles—Marketing Intelligence Directly Impacts Solution Development

Developing the Winning Approach

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The Business Development Lifecycle

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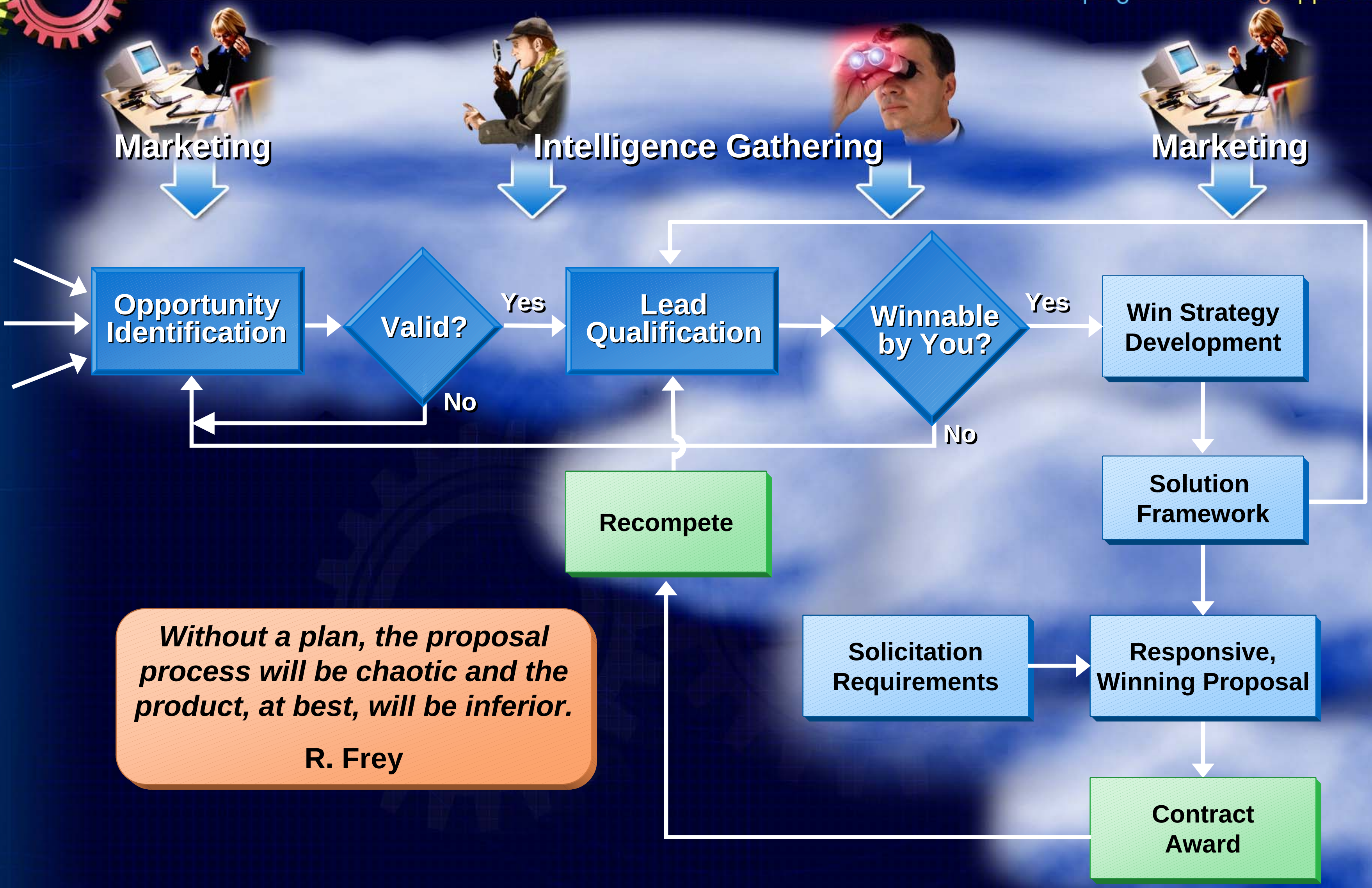
Developing the Winning Approach

Business Development


Marketing
Intelligence Gathering
Marketing
Opportunity Identification
Valid?
Yes
No
Lead Qualification
Winnable by You?
Yes
No
Win Strategy Development
Solution Framework
Recompete
Solicitation Requirements
Responsive, Winning Proposal
Contract Award

Without a plan, the proposal process will be chaotic and the product, at best, will be inferior.

R. Frey

Identification [Milestone 0]

Developing the Winning Approach

Business Development

- Identification sources
  - Commercial services [e.g., Input, FedSources, etc.]
  - Government Web sites [e.g., FedBizOps, Agency Procurement Web Sites, etc.]
  - GWAC program offices [e.g., COMMITS, ITOP II, NIH CIOSP 2]
  - Networking
- Identification step goals/exit criteria
  - (1) Is the opportunity real?
  - (2a) Why should you pursue this opportunity?
  - (2b) What is the opportunity’s strategic value to you?
  - (2c) What is the business case for this opportunity?
- Must complete at least 9 months prior RFP release

Qualification—10,000-Foot View

Business Development

- Must pass qualification step at least 6 months prior to RFP/RFS release!
  - Capture Team needs time—winning does not happen overnight
- Solid, unbiased qualification key to winning
  - Note qualification milestone skipped all too often
- Qualification goals/exit criteria
  1. Validate you can win opportunity
  2. Business case—demonstrate opportunity warrants (potentially) bidding
  3. Gather customer intelligence—build customer relationship
  4. “Jump start” Capture Team
- You MUST VISIT CUSTOMER to recommend passing qualification milestone

Qualification—10,000-Foot View

Business Development

- It’s all about winning:

  *Winner is the Prime, as evaluated by the customer, whose approach (proposal) is **demonstrably different** and **superior** when **evaluated** against **stated** and **unstated criteria***

- Questions:
  1. Who is the customer?
  2. What are unstated criteria?

063

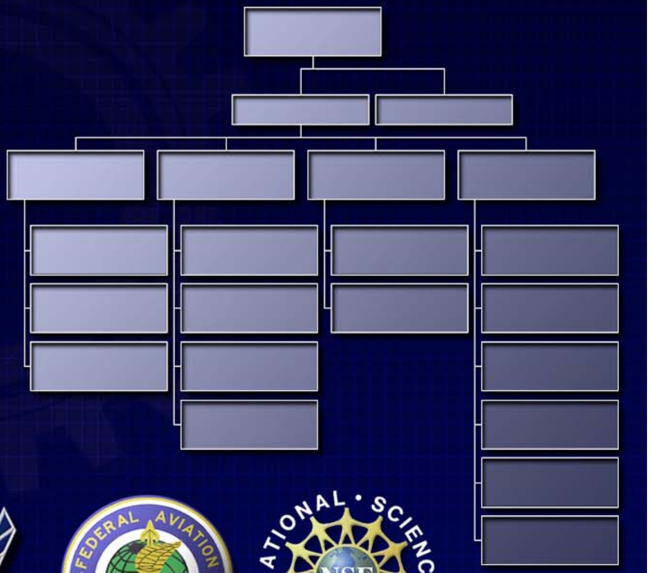
Qualification—Who Is the Customer?

You need to know/influence/be loved by:

- SSA (Source Selection Authority)
- SEB (Source Evaluation Board)
  - CO/COTR
- Key decision makers who can/will influence SSA/SEB
  - E.g.: CIO, Department/Agency/Center Director, CFO, Procurement Director
- Key stakeholders
  - E.g.: Task Monitors/Branch Chiefs who drive contract requirements or manage contract tasks
- Bottom line: Map opportunity to customer organization

You must sell to the right customer reps to win!

Forms basis of call plan



Qualification—What Does the Customer Really Want?

Examples—Specifics Depend on Opportunity

Management Approach

- Performance based?
- Do they like incumbent (company vs. staff)?
- Benefits important? Enough to pay more for better benefits?

Key Personnel

- PM qualifications? Like current PM?
- Key personnel qualifications? Like current key personnel?
- Diversity important?

Staffing Plan

- 100% incumbent capture? If not, who do they not like?
- Known staffing plan or MEO?
- Recruiting and retention important?

Technical Approach

- Status Quo? Innovations?
- COTS packages liked/disliked?
- Processes?

Phase-In

- Most important?
- Special considerations?

Cost

- Best value?
- #1 consideration?

Competition/Potential Teammates

- Prefer large business or small business?
- Prefer local companies?
- Who do they like?
- Who do they not like?

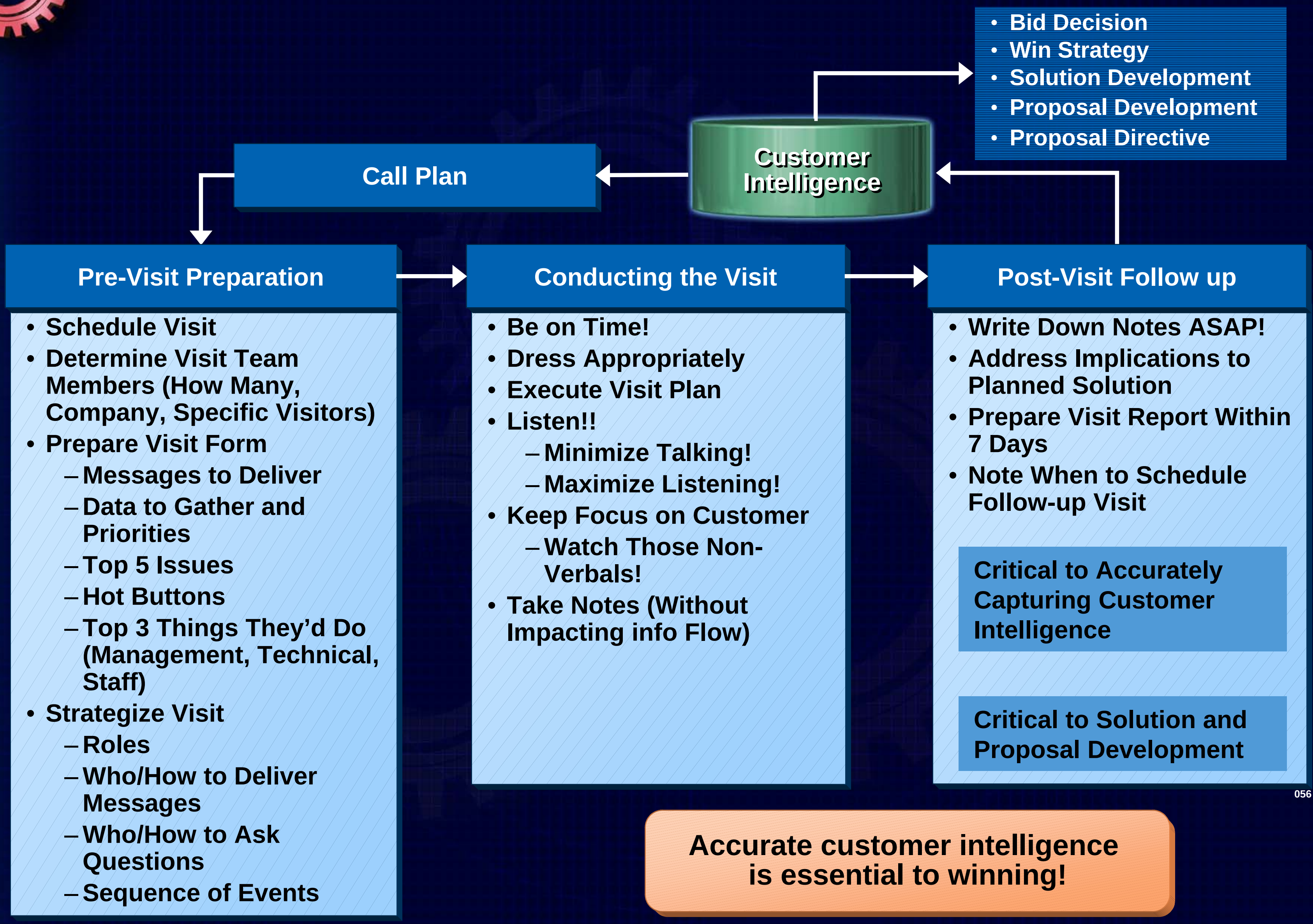
Risk Management

- Important?
- Particular risks?

Your job is to help the customer know what they want!

Call Plans—Customer Calls

Business Development



- Bid Decision
- Win Strategy
- Solution Development
- Proposal Development
- Proposal Directive

Customer Intelligence

Call Plan

Pre-Visit Preparation

- Schedule Visit
- Determine Visit Team Members (How Many, Company, Specific Visitors)
- Prepare Visit Form
  - Messages to Deliver
  - Data to Gather and Priorities
  - Top 5 Issues
  - Hot Buttons
  - Top 3 Things They'd Do (Management, Technical, Staff)
- Strategize Visit
  - Roles
  - Who/How to Deliver Messages
  - Who/How to Ask Questions
  - Sequence of Events

Conducting the Visit

- Be on Time!
- Dress Appropriately
- Execute Visit Plan
- Listen!!
  - Minimize Talking!
  - Maximize Listening!
- Keep Focus on Customer
  - Watch Those Non-Verbals!
- Take Notes (Without Impacting info Flow)

Post-Visit Follow up

- Write Down Notes ASAP!
- Address Implications to Planned Solution
- Prepare Visit Report Within 7 Days
- Note When to Schedule Follow-up Visit

Critical to Accurately Capturing Customer Intelligence

Critical to Solution and Proposal Development

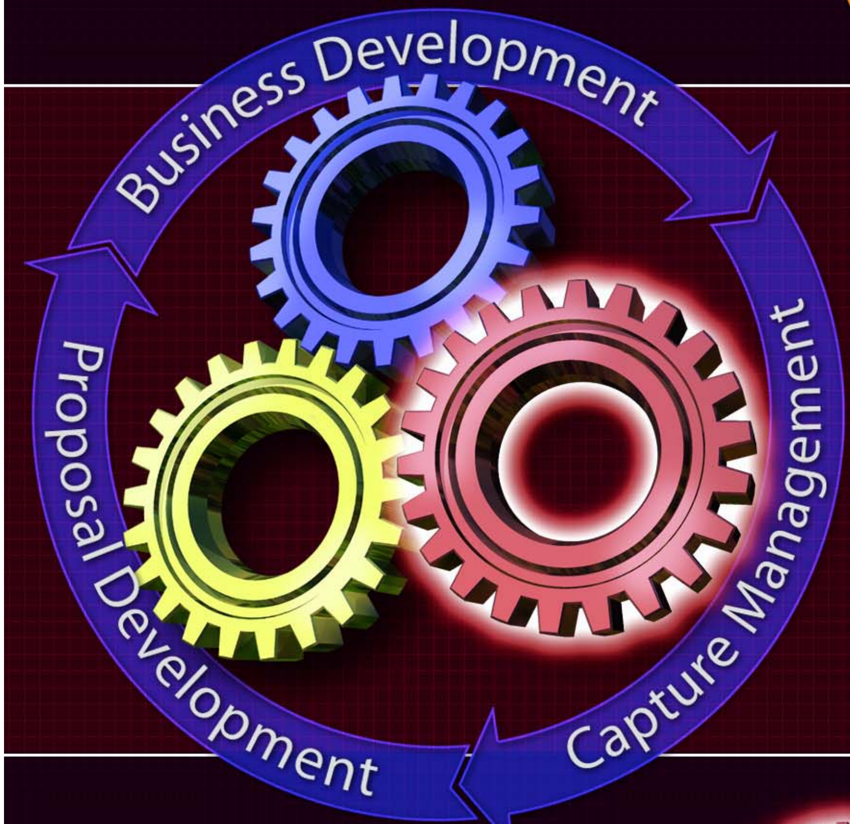
Accurate customer intelligence is essential to winning!

How Successful Business Development Contributes to Winning Proposals

- Verifying opportunity is real
- Influencing the acquisition (strategy, schedule, RFP specifics, etc.)
- Solid, unbiased lead qualification
- Know the customer better than anyone else (buying habits, likes, dislikes, etc.)
- Bottom line: Successful Business Development validates:

1. Opportunity has sufficient business case
2. You can win opportunity

Developing the Winning Approach


Business Development
Capture Management
Proposal Development

Capture Management

"The Rodney Dangerfield Gear"

Capture Management

Business Development

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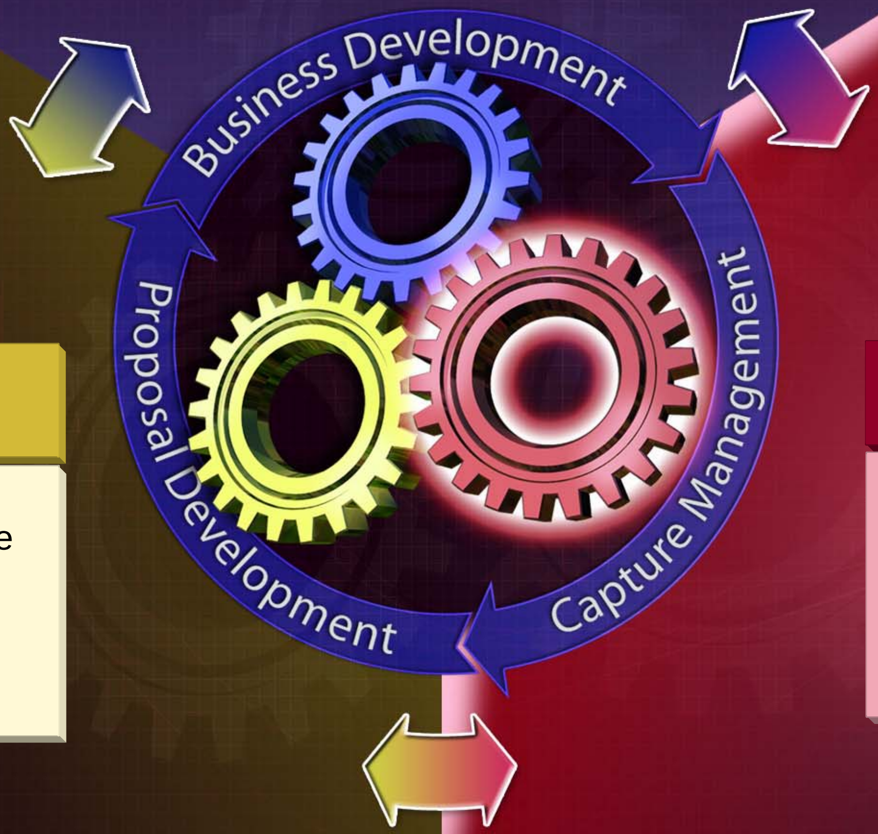
Business Development
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Proposal Management

- Driving the Solutions into the Documents

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On the critical path

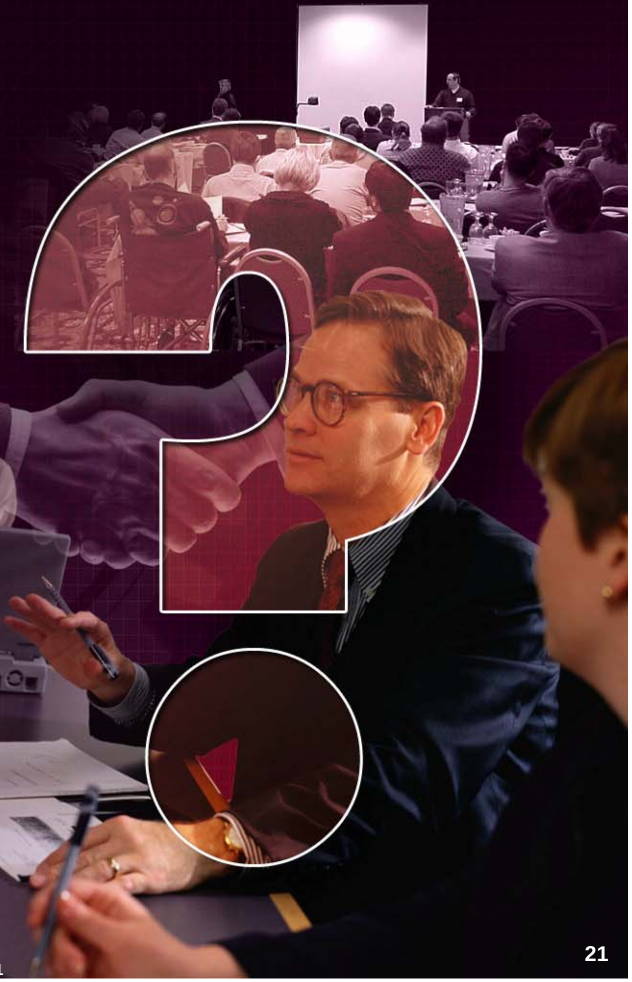
Win Strategy Checklist

RSIS

Developing the Winning Approach

Capture Management

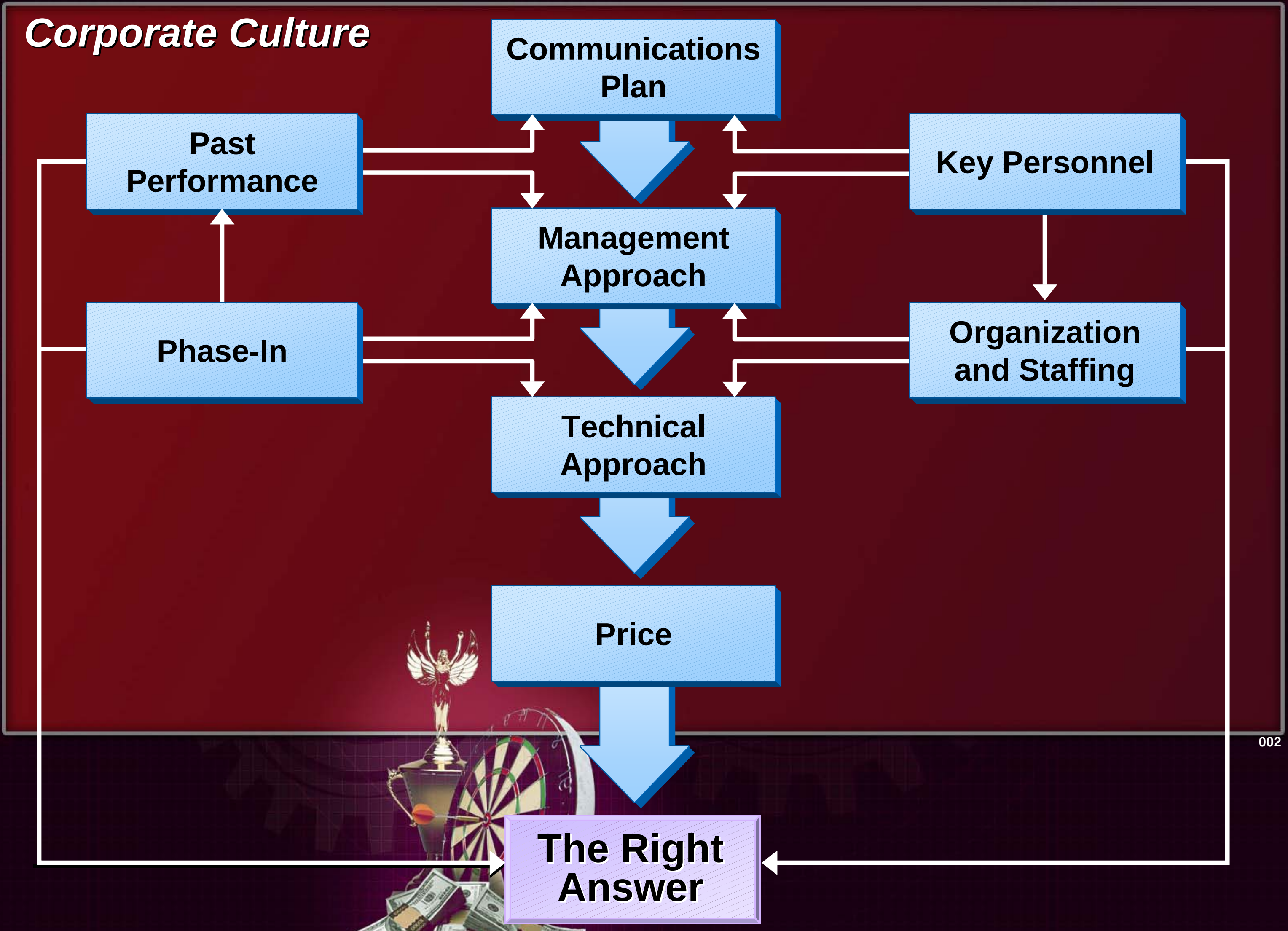
1. **Image Strategies** - Who must we be to win?
2. **Commitment Strategies** - What must we do To guarantee our winning commitment?
3. **Team Strategies** - Whom must we assemble and how?
4. **Organization Strategies** - How must we be organized to win?
5. **Approach ("How To") Strategies** - What must we specifically describe and offer to win?
6. **Performance Strategies** - How must we perform and manage the approach?
7. **Price Strategies** - What price must we have to win?
8. **Experience and Capability Strategies** - What must we have done to win that is relevant and beneficial to this customer and this procurement/requirements?



Win Strategy Checklist (cont.)

9. **Past Performance Strategies** - How well must we have historically performed for this customer and others to win?
10. **Key Personnel** - What personnel with what qualifications must be identified to the customer by name and resume to win?
11. **Discriminators** - What are our win themes/ Discriminators? *[Only the Customer defines a Discriminator (perception counts!). **A UNIQUE** benefit is one that meets or exceeds conformed customer expectations, and which our competitors are not likely to offer. The benefit must distinguish your team from the competitors. Ideally, discriminators will be concrete and quantifiable benefits rather than fuzzy, intangible benefits. Themes should be easy to understand, provide high perceived value, be easy to quantify, and be easy to remember.]*

Solution Framework

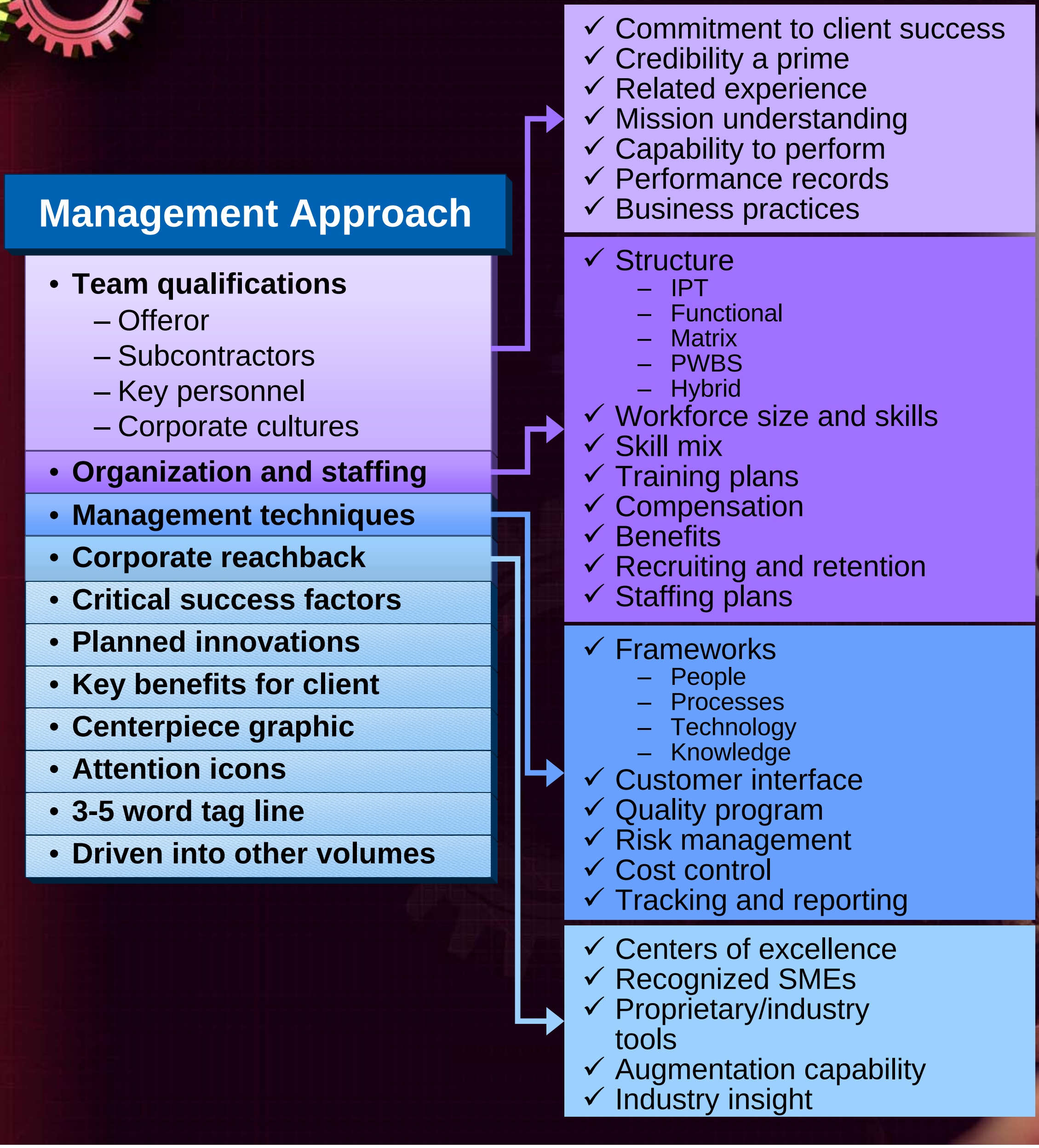

Corporate Culture
Communications Plan
Past Performance
Key Personnel
Management Approach
Phase-In
Organization and Staffing
Technical Approach
Price
The Right Answer

002

Management Approach

Developing the Winning Approach

Capture Management



Management Approach

- **Team qualifications**
  - Offeror
  - Subcontractors
  - Key personnel
  - Corporate cultures
- **Organization and staffing**
- **Management techniques**
- **Corporate reachback**
- **Critical success factors**
- **Planned innovations**
- **Key benefits for client**
- **Centerpiece graphic**
- **Attention icons**
- **3-5 word tag line**
- **Driven into other volumes**

✓ Commitment to client success
✓ Credibility a prime
✓ Related experience
✓ Mission understanding
✓ Capability to perform
✓ Performance records
✓ Business practices

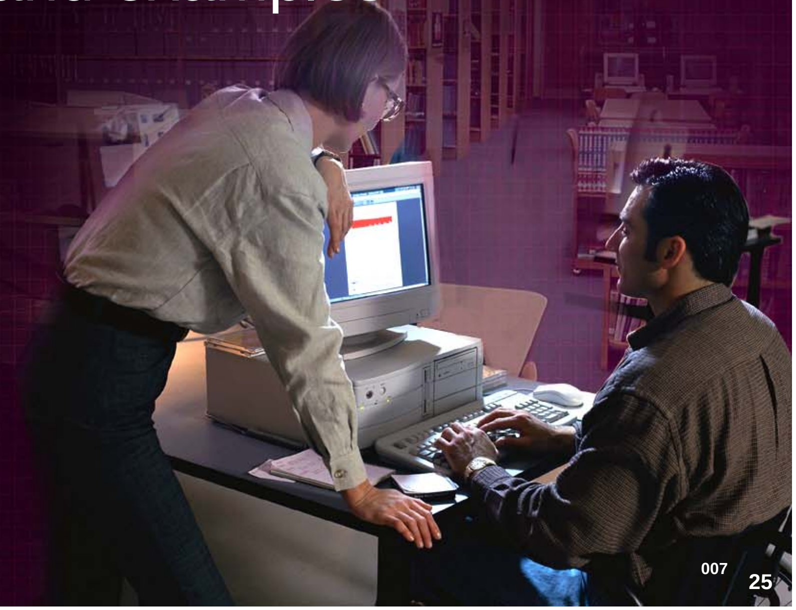
✓ Structure
  – IPT
  – Functional
  – Matrix
  – PWBS
  – Hybrid
✓ Workforce size and skills
✓ Skill mix
✓ Training plans
✓ Compensation
✓ Benefits
✓ Recruiting and retention
✓ Staffing plans

✓ Frameworks
  – People
  – Processes
  – Technology
  – Knowledge
✓ Customer interface
✓ Quality program
✓ Risk management
✓ Cost control
✓ Tracking and reporting

✓ Centers of excellence
✓ Recognized SMEs
✓ Proprietary/industry tools
✓ Augmentation capability
✓ Industry insight

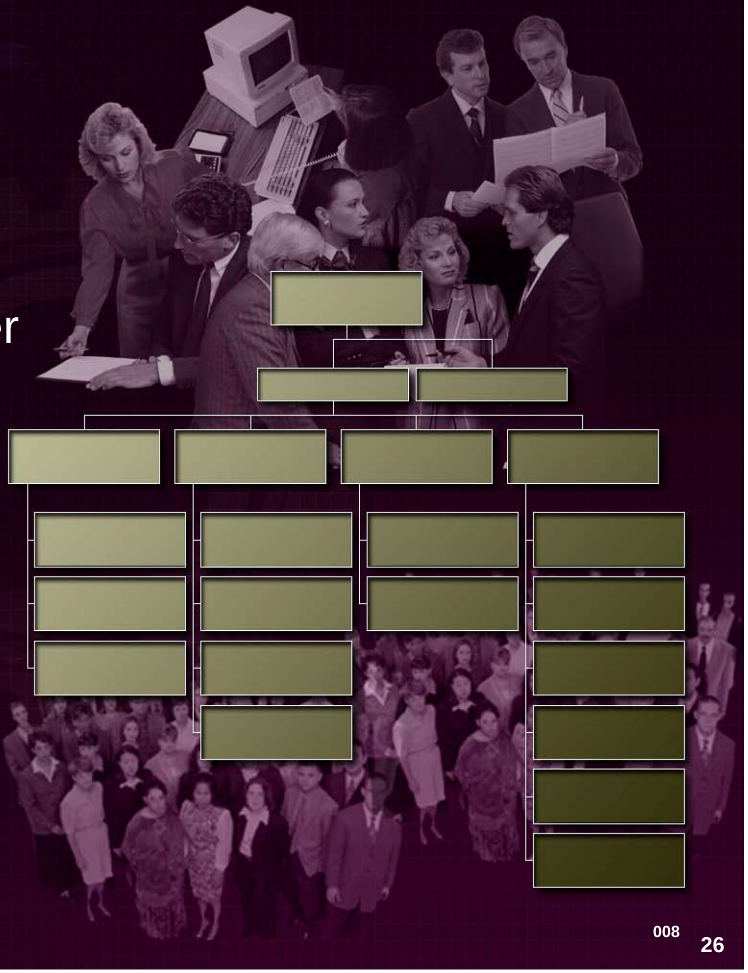
Key Personnel

- Known and respected by client
- Related current/recent experience
- Tech and management skills
- Education
- Training
- Certifications
- Security clearances
- Current employee
- Published
- Available
- Committed to program
- Work experience with proposed management team
- Sincere/trustworthy
- Linked to approaches, experience, performance and examples



Organization and Staffing

- Along with key personnel, organization and staffing form the heart of a services bid—these elements:
  - Directly impact all other sections or volumes
  - Establish performance credibility
  - Are the primary cost drivers
- Organization must be customer-facing
- Key interfaces must be properly defined
- Succession planning is important
- Staff refresh—begins with phase-in and never stops
- Skill sets must include requisite training and certifications
- Accurate job descriptions convey mission understanding



Past Performance

- Direct mission relevance
  - Recent/current
  - Valid
- Depth and breadth of experience
- Why successful
- Focus on partnership
- Instill confidence for proposed solution
- Performance records
  - Offeror
  - Subs
  - Citations
  - Awards
  - References
  - Special achievements
  - Award fee scores
  - CPARS

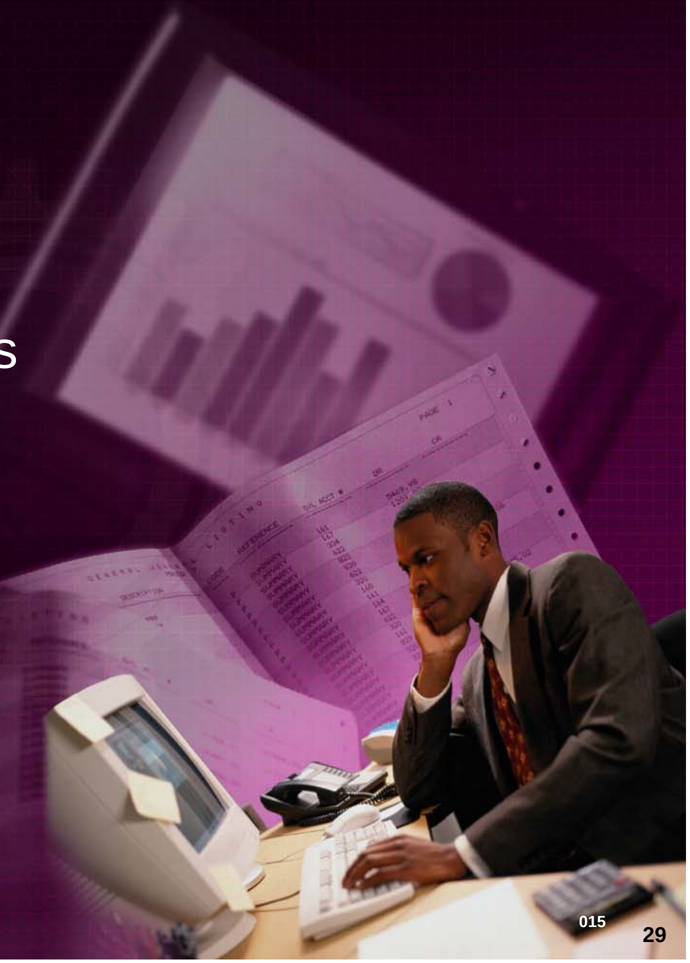
Technical Approach

- Establish/reinforce credibility
  - – Show unmatched mission and task understanding
  - – Provide performance examples
  - – Leverage past performance volume
  - – Highlight related management team accomplishments
- Identify critical success factors
- Focus on approach on who, when, how, where, what, why

Branch 1
Branch 2
Data Evaluation
Phase 1

Cost

- Realistic and reasonable
  - Skill mix (balanced/greening)
  - Salaries and compensation (TCP) structure
  - Escalations (based on accepted source)
  - ODCs (sources)
  - Productive work year
  - Defendable rates (salary)
  - Lapse/vacancy rate
- Loading/wrap rates including documented history and explanation of out-year changes
  - G&A
  - Overhead
  - Handling
  - Fee
  - Fringe



In Summary

Valuable Lessons Learned

- You cannot skip steps
- You must do a thorough job at each step
- The first steps are usually the most critical
- The data from each step must be properly integrated and leveraged to be useful
- There is no free lunch. However, spending more money does not guarantee a win
- Even when you do everything “right” someone else can come up with the “right answer”

Developing the Winning Approach

Business Development
Capture Management
Proposal Development

Proposal Development

Good

is the enemy of

Great

Proposal Development

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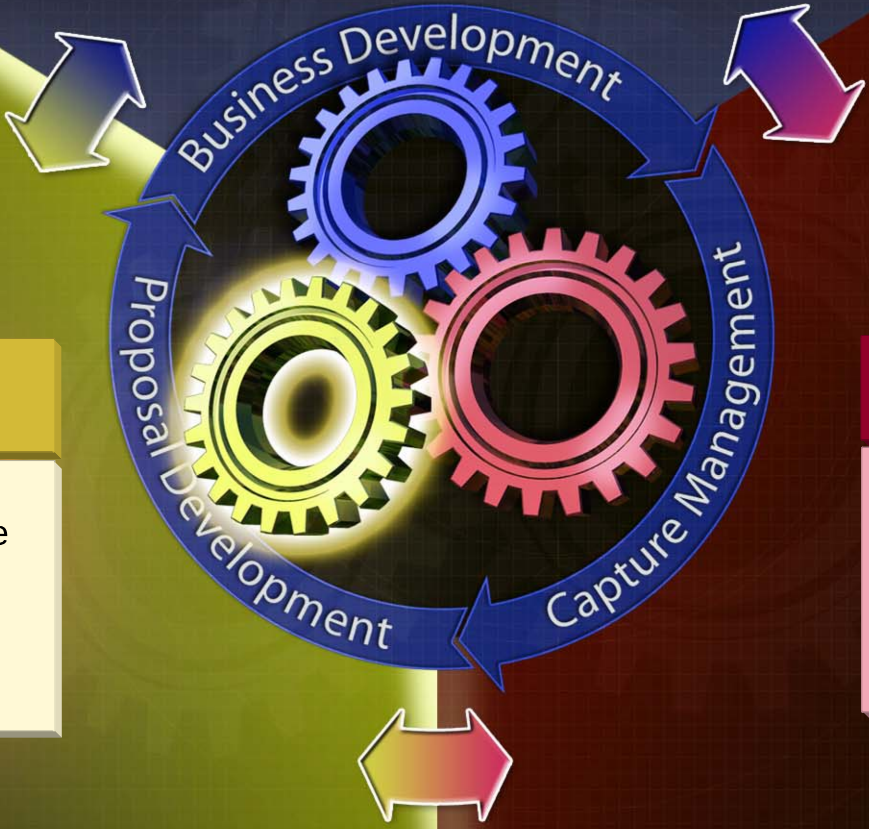
Business Development
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On the critical path

Function of a Proposal

The function of a proposal is to sell both the technical and managerial capabilities of your company to accomplish all required activities on time and at a reasonable cost.

Proposals are Deliverable Products

- Because you obtain new business via proposals, they represent your most important product.
- Every proposal you submit must be your finest effort. Proposals reflect directly upon your company.
- Proposals must be internally consistent and written uniformly.

Proposals are Deliverable Products

- Proposals represent the final exam of your business acquisition process
  - You are scored, literally, on your Technical and Management Approach, Past Performance and Relevant Experience, Staffing, and Price

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Proposals are – first and foremost – sales documents

Your Proposal Must Answer the Question—

Why you?

And why *NOT* your competition?

Letting Your Customers See Themselves in Your Proposals

Letting Your Customers See Themselves in Your Proposals
RSIS
www.rsis.com
6423

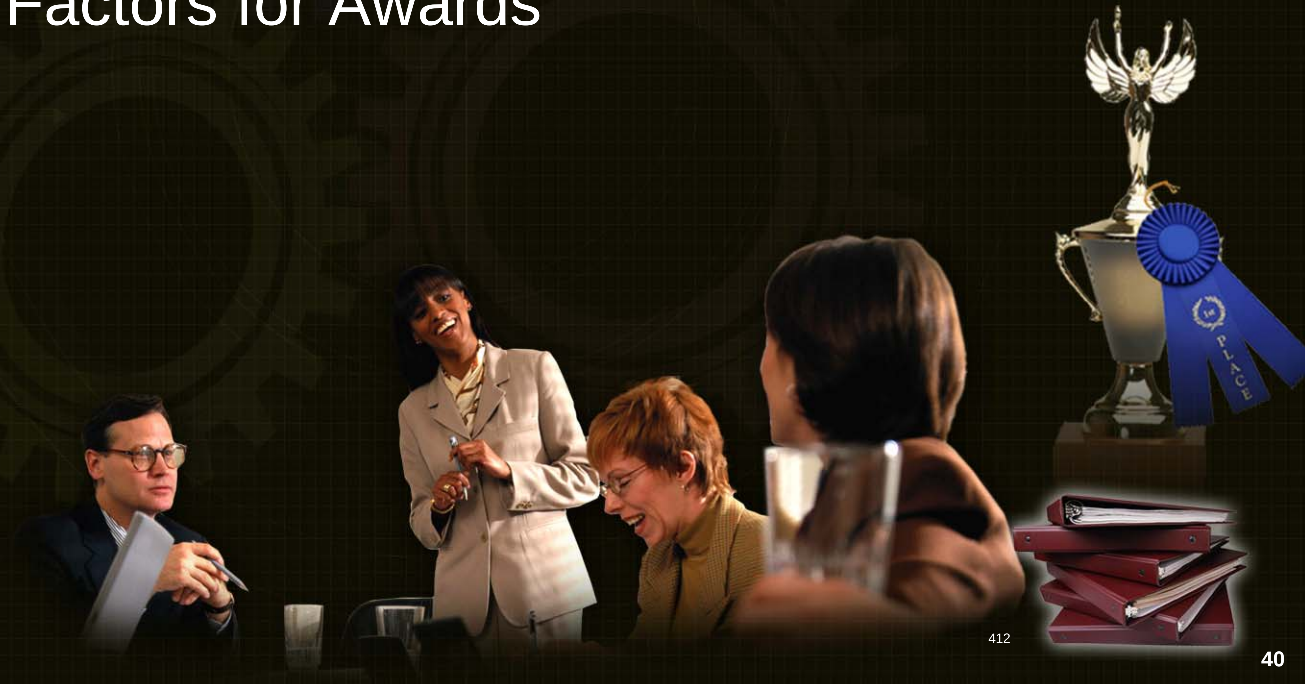
143v5

Trigger Point: Request for Proposal (RFP)

- Solicitation document issued by the customer to obtain offers from contractors/suppliers that propose to provide products or services under a contract to be awarded using the process of competitive bidding and negotiation
- For US government work, essentially the same in terms of their major sections as a result of the Uniform Contract Format (FAR Subpart 15.406-1)
  - Beginning in 1984, the Federal Acquisition Regulations (FAR) established uniform policies and procedures by all Federal executive agencies

Major Sections of the RFP

- Section C:
  - Description, Specifications, and Work Statement
- Section L:
  - Instructions, Conditions, and Notices to Offerors
- Section M:
  - Evaluation Factors for Awards



Guidelines for RFP Sections

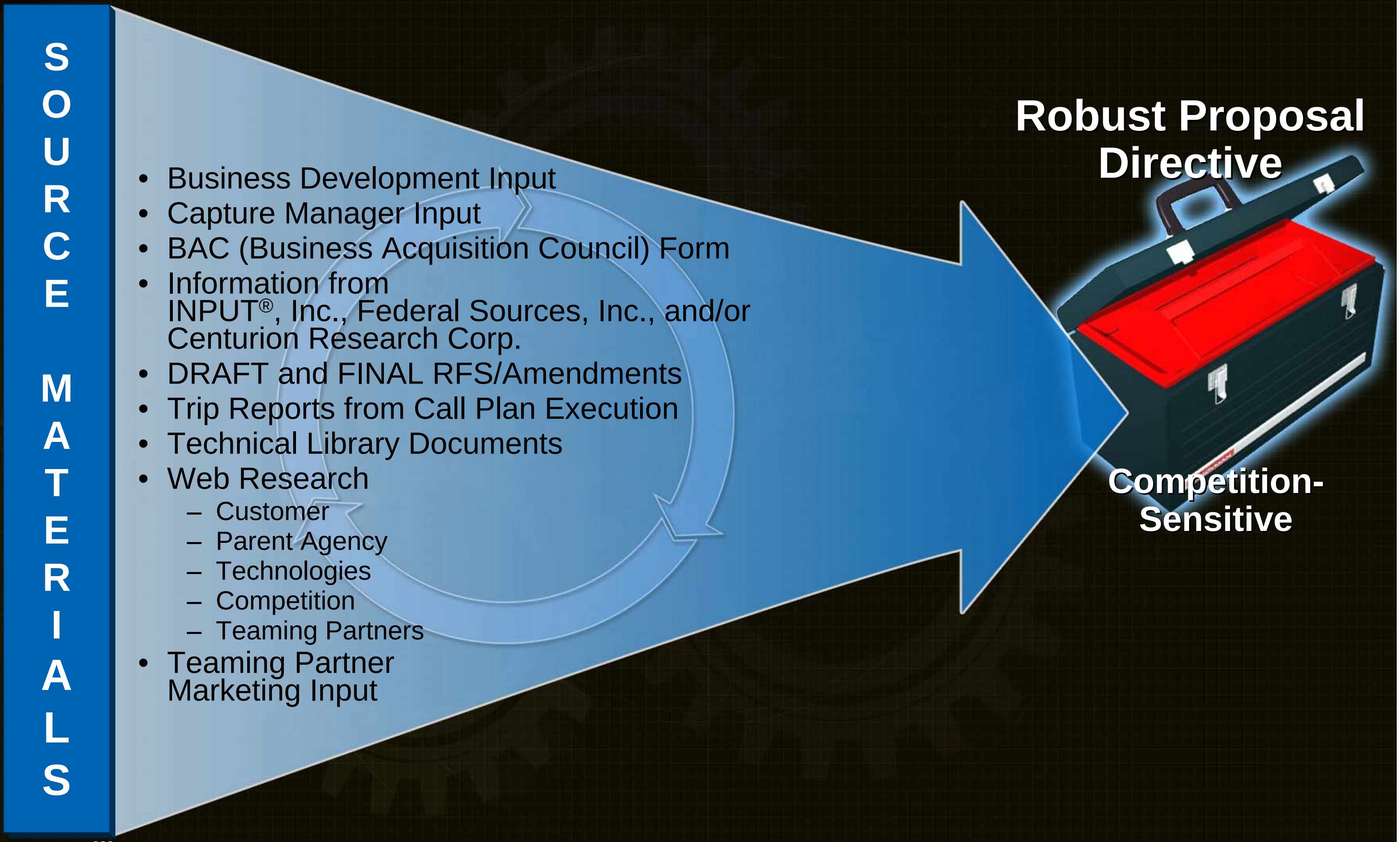
- Section C:
  - Headings and Subheadings for Proposal Text
- Section L:
  - Provides Specific Instructions for Preparing and Structuring the Proposal Document: Margins, Font Families, Number of Foldout Pages Allowed, Page Limits, Double-sided Copying Requirements
  - Outline and Sectional Numbering Conventions
- Section M:
  - Criteria for Evaluation
  - Guide for Page Allocations

Evaluation Criteria
RFP

Building the Proposal Directive

Developing the Winning Approach

Proposal Development



SOURCE MATERIALS

- Business Development Input
- Capture Manager Input
- BAC (Business Acquisition Council) Form
- Information from INPUT®, Inc., Federal Sources, Inc., and/or Centurion Research Corp.
- DRAFT and FINAL RFS/Amendments
- Trip Reports from Call Plan Execution
- Technical Library Documents
- Web Research
  - Customer
  - Parent Agency
  - Technologies
  - Competition
  - Teaming Partners
- Teaming Partner Marketing Input

023

Robust Proposal Directive

Competition-Sensitive

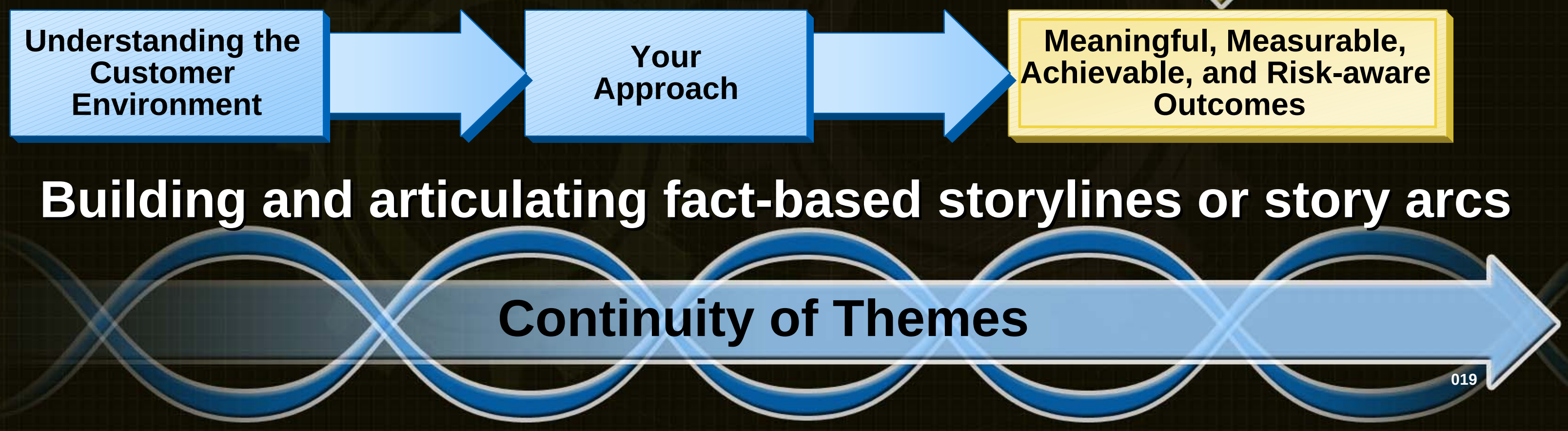
Encyclopedia of a WIN

Solution Development

Solution Sets

- **Technical** ☑
- **Program Management** ☑
- **Staffing** ☑
- **Phase-in** ☑
- **Past Performance** ☑

What this means to your customer is…



Understanding the Customer Environment → **Your Approach** → **Meaningful, Measurable, Achievable, and Risk-aware Outcomes**

Building and articulating fact-based storylines or story arcs

Continuity of Themes

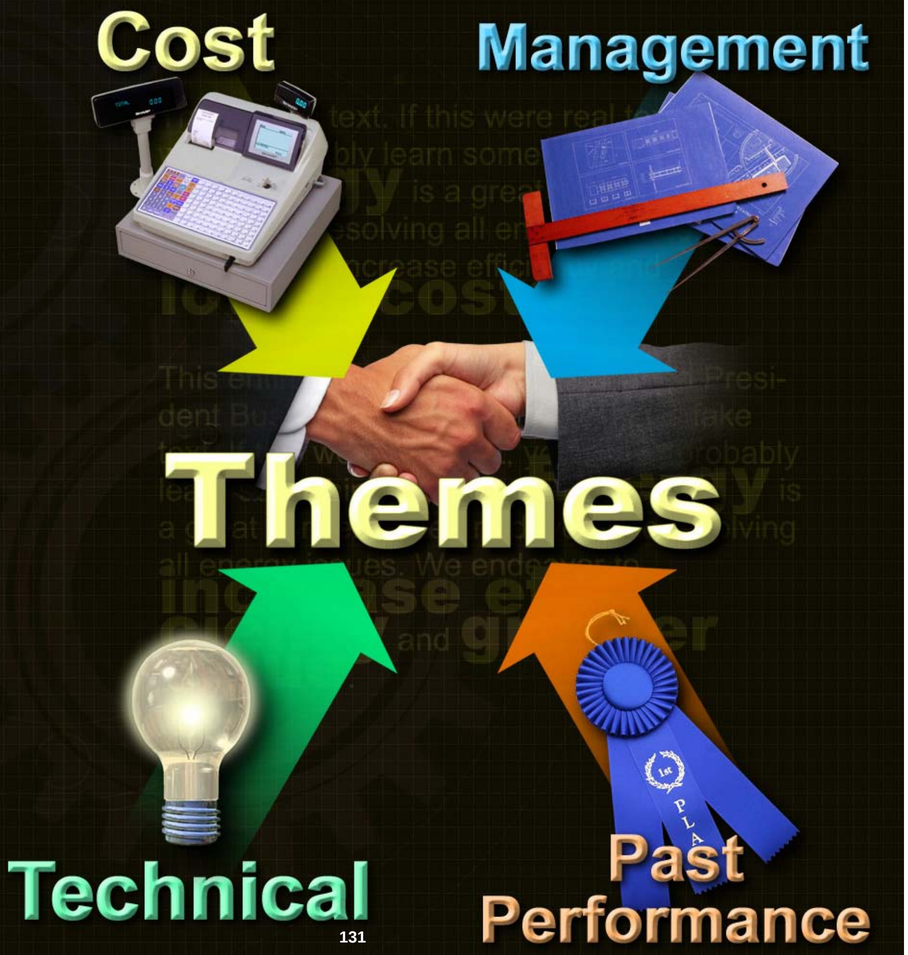
Weaving the story

Themes Bring Your Proposal to Life

- Sales Message
- Point of Emphasis
- Advantage to the Customer
- Benefit to the Customer
- Focus for Writing

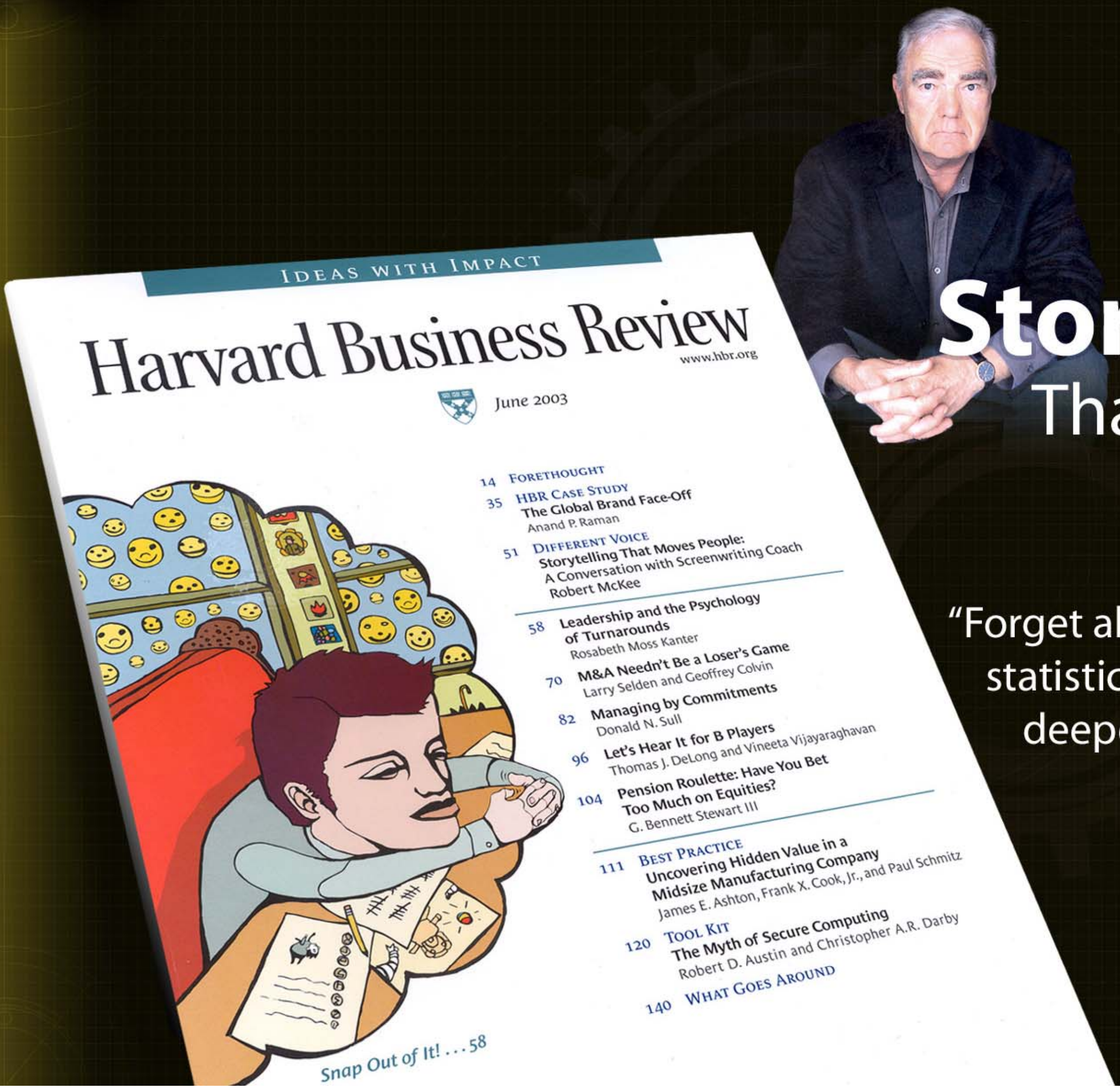
Themes Support Claims

- Themes reappear, woven throughout the proposal volumes, and serve to focus and unify the entire presentation
- Effective themes are direct, address a program issue or customer concern, and are supported by concrete evidence



Themes are conclusive reasons why the client should select your company, and NOT your competitors

The Importance of Storytelling



IDEAS WITH IMPACT

Harvard Business Review

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June 2003

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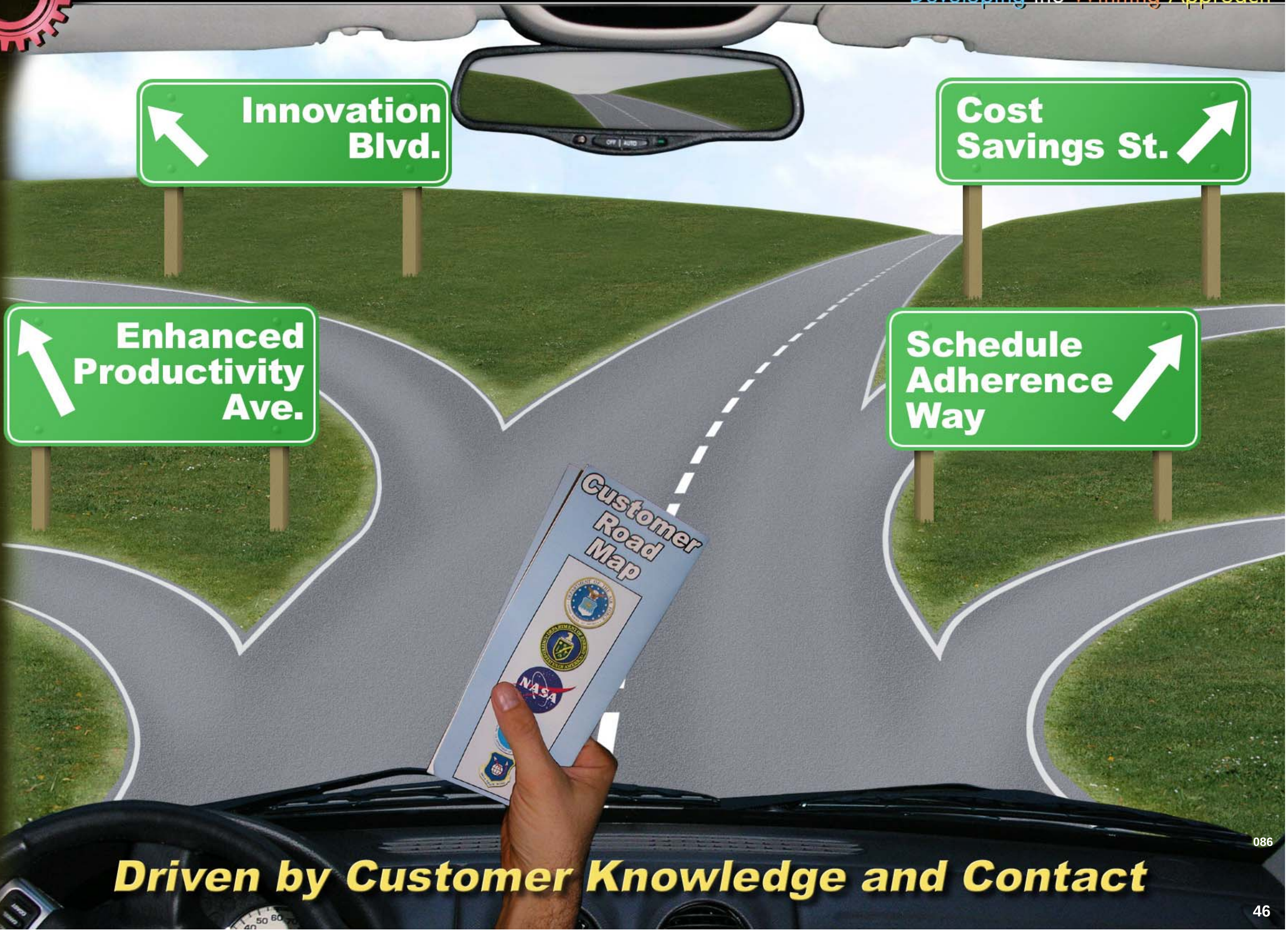
Thomas J. DeLong and Vineeta Vijayaraghavan
104 Pension Roulette: Have You Bet Too Much on Equities?
G. Bennett Stewart III
111 BEST PRACTICE
Uncovering Hidden Value in a Midsize Manufacturing Company
James E. Ashton, Frank X. Cook, Jr., and Paul Schmitz
120 TOOL KIT
The Myth of Secure Computing
Robert D. Austin and Christopher A.R. Darby
140 WHAT GOES AROUND

Snap Out of It! . . . 58

Storytelling
That Moves People
by Robert McKee

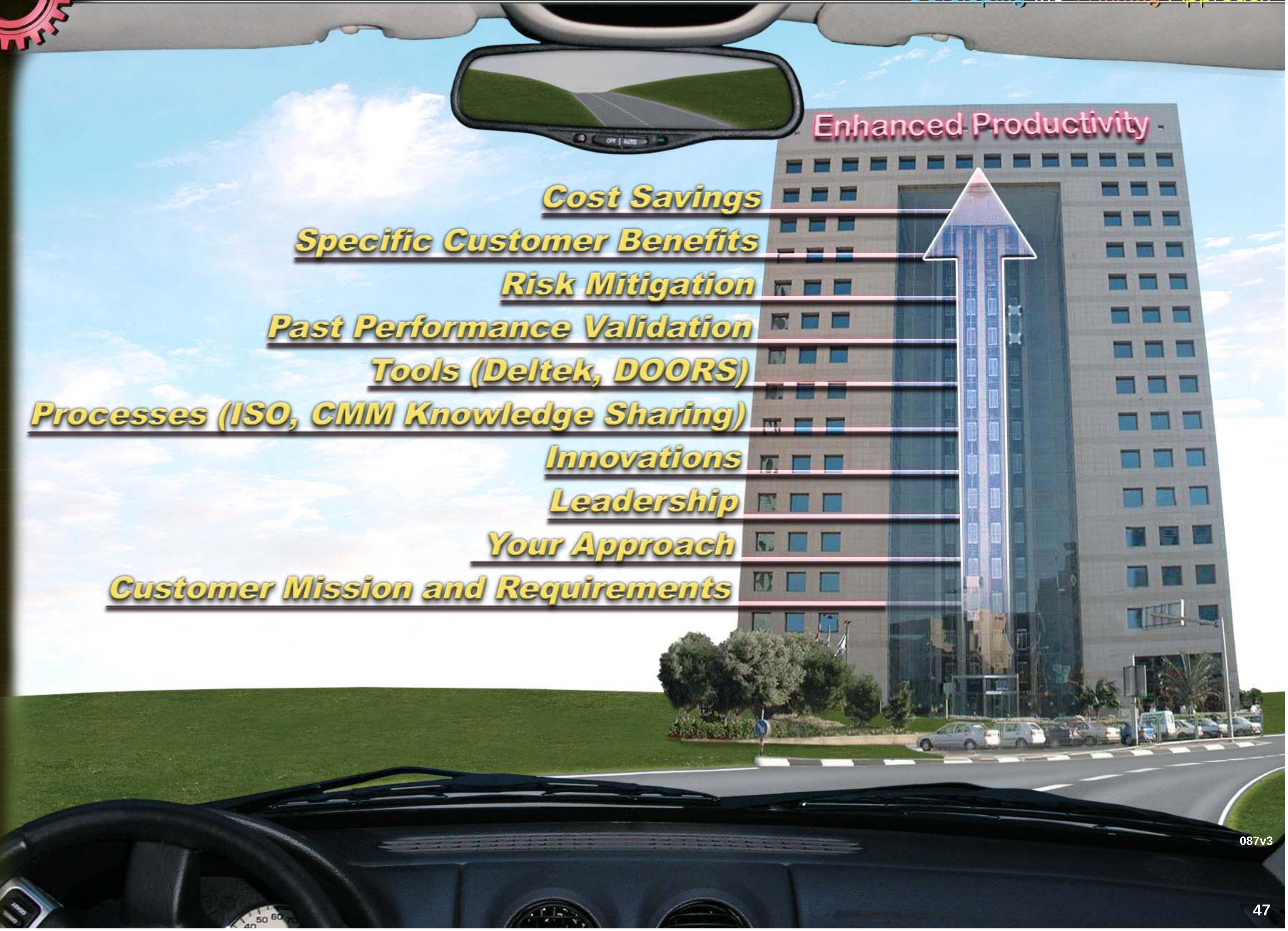
"Forget about PowerPoint and statistics. To involve people at the deepest level, you need stories."

Taking the Right Road


Innovation Blvd.
Cost Savings St.
Enhanced Productivity Ave.
Schedule Adherence Way
Customer Road Map
NASA

Driven by Customer Knowledge and Contact

Building Your Elevator Speech



Enhanced Productivity

Cost Savings

Specific Customer Benefits

Risk Mitigation

Past Performance Validation

Tools (Deltek, DOORS)

Processes (ISO, CMM Knowledge Sharing)

Innovations

Leadership

Your Approach

Customer Mission and Requirements

Real Live Elevator Speech

Knowledge from Chuck Sharrocks, RSIS PM

Marketing intelligence

From storyboarding sessions

From RFS

From RFS

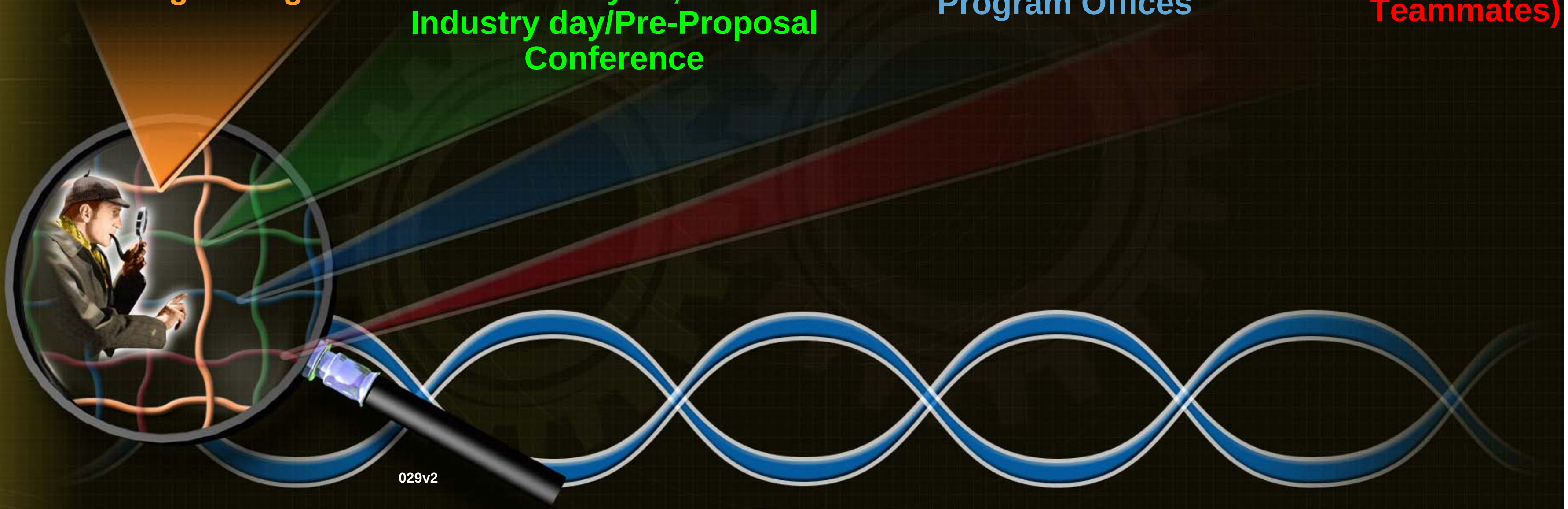
TEAM RSIS will work in a trust-based partnership with DOE towards a common business and mission focus. Everything about our management solution for the DOE ITISS program has been geared to mitigate risk, support organizational change, and optimize return on investment (ROI) of all enterprise assets as we proceed together to stabilize, optimize, and transform our environment. We view ourselves as a best-value resource partner to DOE for managing programmatic and departmental mission success. In maximizing DOE's ROI on IT assets and capital investments, and in supporting DOE's critical role in federal e-Government, we bring the Agency a WIN/WIN solution at both the enterprise and project levels.

Knowledge from incumbent contractors (our Teammates)

Marketing intelligence

From Dave Tyma, DOE CO Industry day/Pre-Proposal Conference

Sensitivity to OCIO and Program Offices



Fine threads in the storyline

Solution Development

Metrics

Meaningful, Measurable, Achievable, and Risk-aware Outcomes

Reduced direct labor requirements by 4 FTEs during the base year

Ensured business systems availability of 99.89%

Increased Return on Investment (ROI) in legacy IT infrastructure by 3.7 percent

Drove Total Cost of Ownership (TCO) down by $300,000 over 1.5 years

Compressed schedule by 8 days

Validate with numbers

Selling Your Human Talent—Resumes

Developing the Winning Approach

Proposal Development

Rick Stalnaker—*Making a Difference on the Current Program*

Mr. Stalnaker has:

- *Since his first day on PACE I, enhanced communication and trust among all member companies of **TEAM RSIS**. The result has been greater productivity, team harmony, and increased employee morale. In effect, an IPT that works everyday.*
- *Expanded the cross-utilization of personnel to support new projects and IFM and legacy systems.*
- *Personally helped draft proposals to the NASA Headquarters (HQ) CIO to procure funding for advanced collaborative tools.*
- *Added flexibility to the IGI teaming arrangement that allowed **TEAM RSIS** to provide additional world-class telecommunication experts to support advanced networking.*
- *Helped to build the PACE IT Security Program Office, which focuses on lab-wide cybersecurity policy.*
- *Provided leadership to integrate LiveLink across multiple NASA and GRC functional areas. Efforts were targeted to enhance the LiveLink system reliability and customer satisfaction.*
- *Assumed personal responsibility for facility support management. Laid groundwork for new process-driven methodologies. Hired and brought in a dedicated manager to focus on facility support management at no direct cost to GRC.*
- *Attends all PACE Safety Council meetings and plays an active role in meetings and activities. Reviews the agenda and minutes, ensures participation and provides resources needed to accomplish goals. Ensures recognition for contributions to the Safety Program.*

090

Selling Your Contractual Experience—Project Summaries

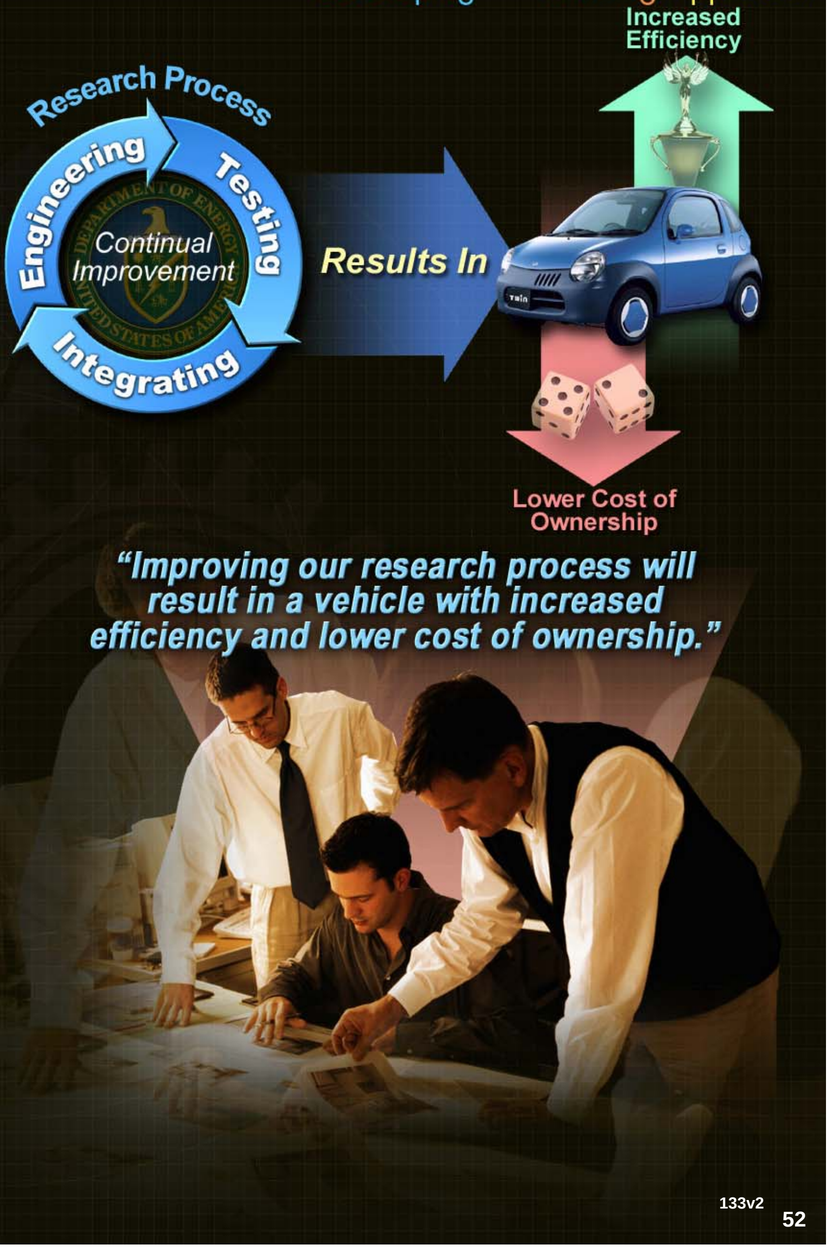
- Update Your Project Summaries Every Quarter
- Focus on the Following:
  - How You Are Aligned with the Customer's Mission
  - Customer Satisfaction Metrics
  - Customer Commendations
  - Award Fees
  - CPARs
  - Use of New Technologies/ Tools
  - Implementation of New Management Processes
  - Application of ISO 9001:2000 and SEI CMM Structured Processes
  - Cost Savings to the Customer
  - Risk Mitigation Approaches that Worked
  - How You Have Linked Your Customer's IT Assets with Their Business Processes
  - On-time Rate of Deliverables
  - Quality Rating for Deliverables
  - Number of Users Served
  - Number and Percentage of Help Desk Calls Resolved on the First Call
  - Average Time to Fill Open Position Requisitions
  - Employee Retention Rates
  - Community Outreach Programs
  - Use of College and High School Interns
  - Alliances with Local Colleges and Universities
  - Mentor-Protégé Programs
- Ensure that customer POCs are accurate and up-to-date

> *"RSIS has provided superior level of service to the Radar Operations Center (ROC). They have been very responsive to customer needs. The work force is of the highest quality and very innovative in all aspects of their ROC support. One significant strength is their ability to listen to the customer and anticipate customer needs."*
>
> **—James Belville, Director,**
> **NEXRAD ROC**
> **RSIS Performance**
> **Assessment Letter**

Your past performance is shared across the company

Effective Graphics Increase Evaluator Interest

- “Action Captions”—Captions should emphasize themes
  - NOT…project interfaces
  - BUT…well-defined interfaces at the Project Manager/COTR level to ensure mutual understanding of changing requirements
- Avoid overly detailed graphics
- Graphics can be used to save space


Increased Efficiency
Research Process
Engineering
Testing
Integrating
Continual Improvement
Results In
Lower Cost of Ownership

“Improving our research process will result in a vehicle with increased efficiency and lower cost of ownership.”

Storyboards

- Break the proposal planning, control, and tracking process into “bite-sized” pieces
- Provide a mechanism to develop a coherent, consistent document from multiple authors in a limited timeframe
- Help to ensure that all RFP requirements are answered and themes are addressed consistently

Storyboard Template

Proposal Volume (Name/Number)

Subsection (Name/Number based on RSIS' Outline)

Writing Lead (Name/Telephone/Email)

Page Budget

Due Date for pre-Blue Team Review

RFP/RFS Requirements

Supporting Information

Major Relevant Proposal Discriminators and Themes

Specific Past/Present Performance References

Performance Metrics

Customer Hopes, Fears, Biases, and "Hot Buttons"

Relevant Success Stories

Graphics Photos (attach or provide electronic filename)

Linkage to the Management and Staffing Sections (who among the program team will focus in this technical area of support during contract execution)

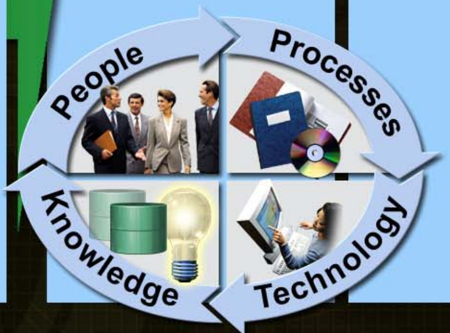
Mission Sensitivity

"Elevator Speech" for lead-in Text Box

Capture and leverage transferable knowledge

Storyboard Template (cont.)

Understanding the Customer Environment			Approach			Value Proposition
Major Issues/Pain Points for the Client (3-5)	Specific Challenges for the Client and Contractor	Critical Success Factors (CSF) for the Client (3-5)	Methodology/ Strategy (People/Process/ Knowledge/ Technology) Assets	Schedule (Short/Mid/ Long-Term)	Risk Mitigation Strategy	Measurable Outcomes (e.g., level of cost savings, specific ROI)



033v4

NO ONE WRITES THIS SECTION UNTIL ALL APPROVALS ARE SIGNED

Approval Chain of Custody

Proposal Manager

Proposal Executive

Capture Manager

Blue Team Leader

Capture and leverage transferable knowledge

Proposal Development

ISO-Driven Review Process Results in Excellent End-Products

RSIS

Developing the Winning Approach

ISO References: QOP-63-01, WI 63-01-BD-07

Reviews focus on:

- Overall credibility, appropriateness, soundness, and clarity
- Alignment of fact-based storyline with customer requirements and mission
- Responsiveness to customer regulations, policies, and practices
- Compliance, completeness, and adequacy of our responses to the solicitation

Blue Team (no narrative at this stage)

- Audit proposal architecture (includes outline at the main heading and subheading level)
- Review storyboards and storylines
- Assess Win Themes and the entire solution framework

Pink Team (narrative and graphics)

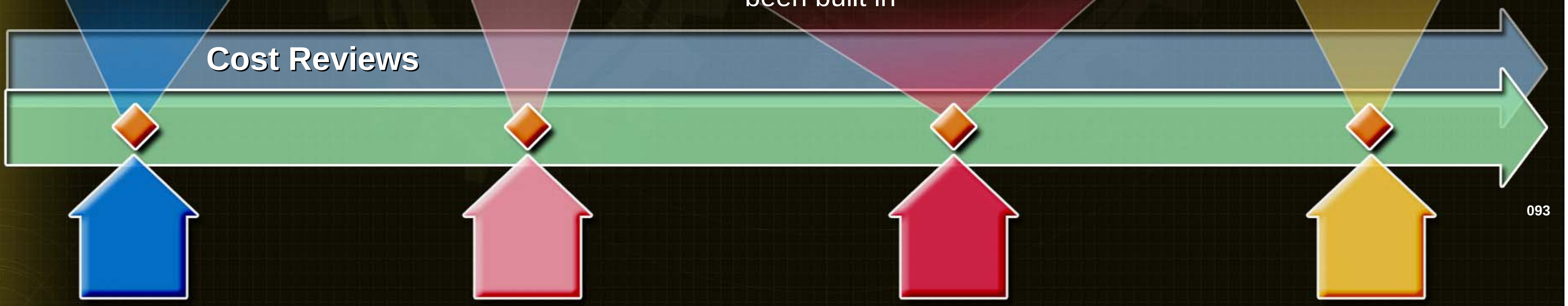
- Assess that the solution framework has been driven into the proposal volumes

Red Team (narrative and graphics)

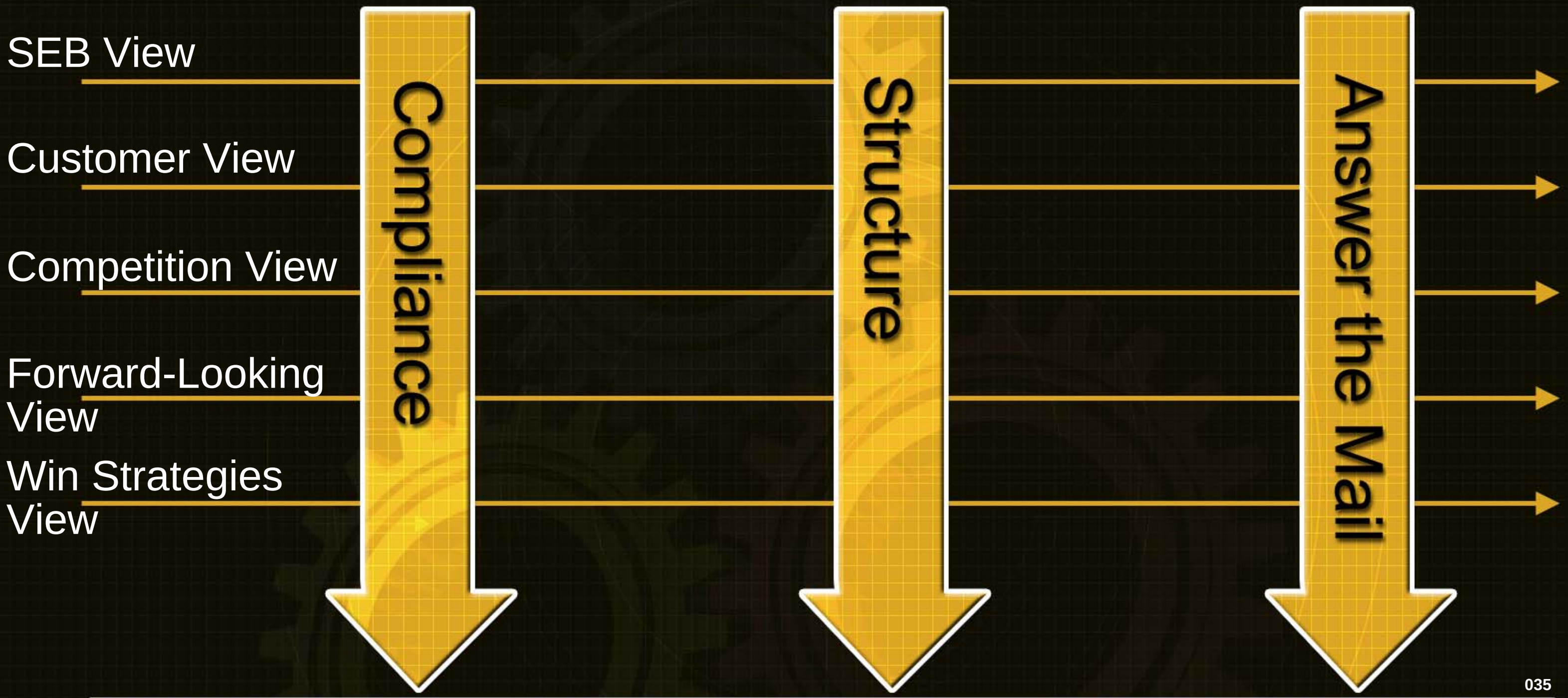
- Evaluate from the Source Evaluation Board's vantage
- Evaluate from the customer's and stakeholders' perspectives
- Verify compliance with RFP/RFS
- Assess from competitors' perspectives
- Ensure that win strategies have been incorporated end-to-end
- Ensure that technical and management innovations have been built in

Gold Team (fully integrated documents)

- Executive-level final review.
- Critical Questions: Did you make the sale? Have you convinced the customer that your company is the best-value solution?



Vertical and Horizontal Reviews



SEB View

Customer View

Competition View

Forward-Looking View

Win Strategies View

Compliance

Structure

Answer the Mail

035

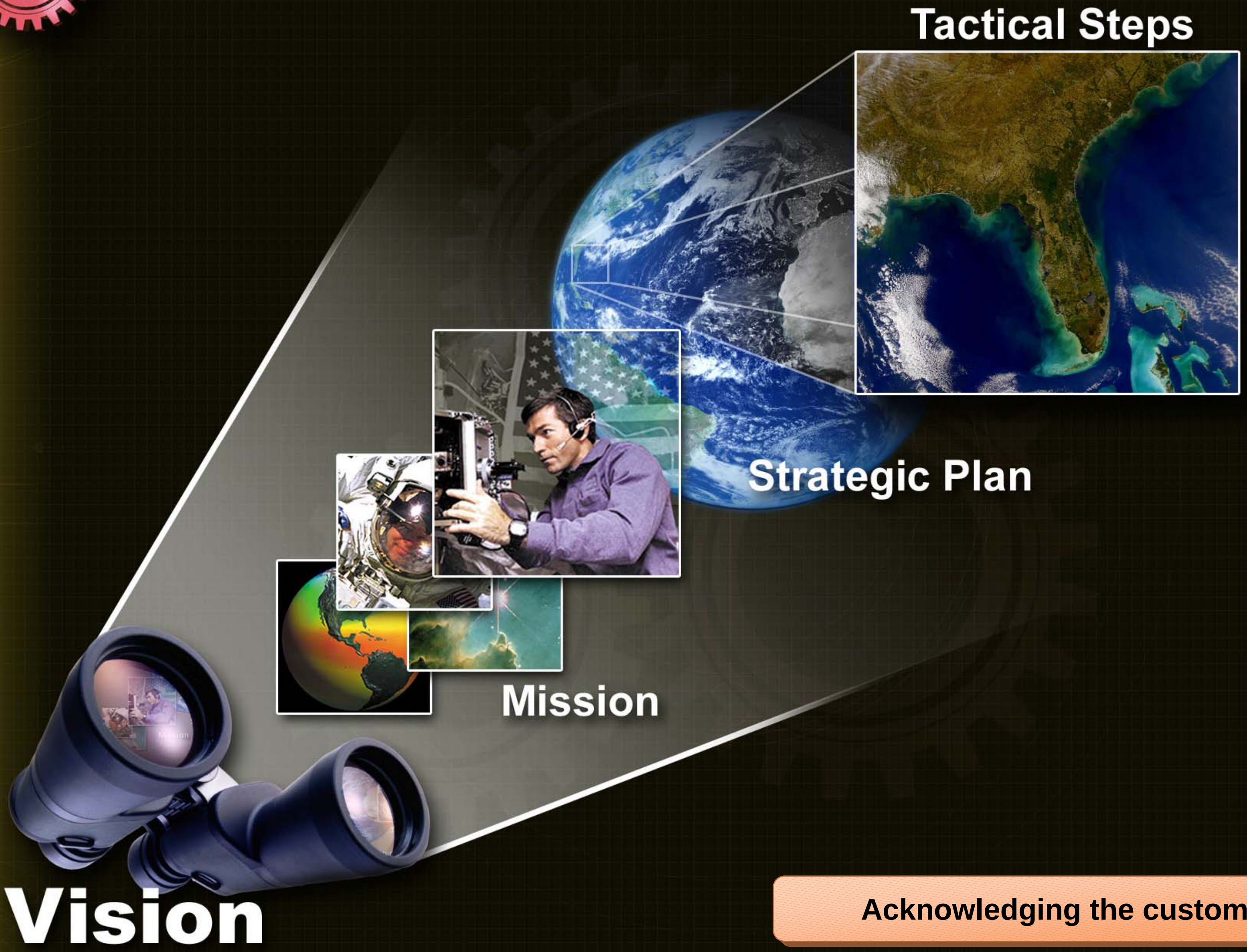
Compliance + Validated Storyline + Comprehensible Presentation=

High Win Probability

—Mona-Lisa Dunn, COMMITS PMO

Ensuring a tightly woven proposal story

Sensitivity to the Customer's Mission


Tactical Steps
Strategic Plan
Mission
Vision

030

Acknowledging the customer

Driving Mission Sensitivity into the Proposal

RSIS

Developing the Winning Approach

Proposal Development

Customer

- Priorities
- Keywords
- Images
- Icons
- Repeated Phrases
- Color Schemes

Letting Your Customers See Themselves in Your Proposals

034v3

Proposal

Cover Letter

Cover Design

Executive Summary

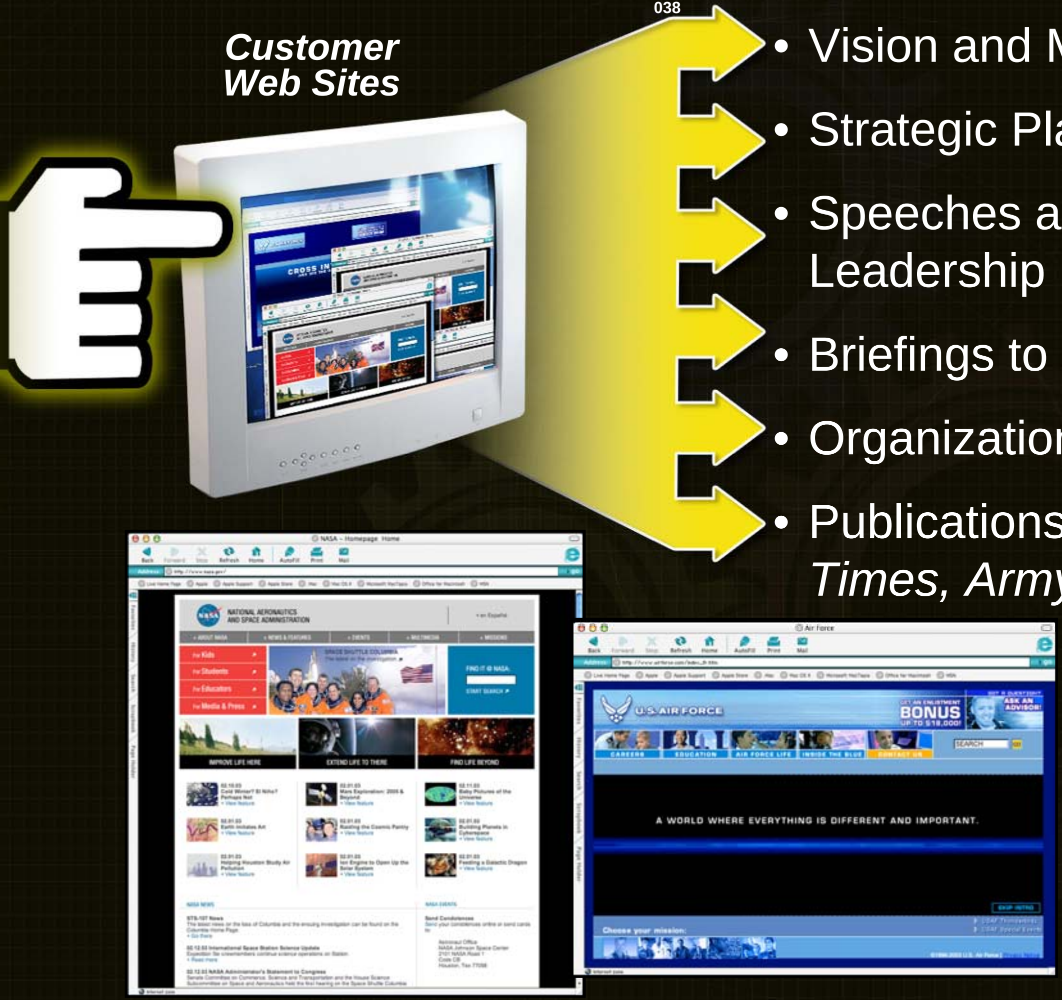
Value Proposition

Graphic Concepts

Oral Presentation

Research Guidelines and Techniques

Customer Web Sites



- Vision and Mission Statements
- Strategic Plans
- Speeches and Biosketchs of Leadership
- Briefings to Industry
- Organizational and Reporting Structure
- Publications (e.g., *Space and Missile Times, Army Times*)

Sources to leverage for developing innovative, knowledge-based proposal solutions

Web Sites You Should Use

Developing the Winning Approach

Proposal Development

Gartner

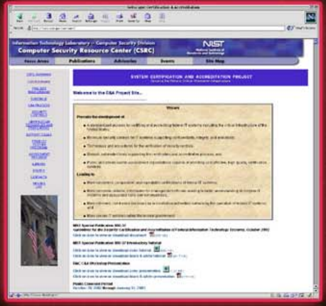
Six Sigma

- Gartner Group
  http://www3.gartner.com/Init
- Six Sigma
  http://www.isixsigma.com/bp/it/
- SEI CMMI
  http://www.sei.cmu.edu/
- U.S. General Accounting Office (GAO)
  http://www.gao.gov/bestpractices/reviews.html#mr
- National Institute for Standards and Technology (NIST) Cybersecurity
  http://csrc.nist.gov/sec-cert/
- President Bush's Management Agenda (Getting to Green)
  http://www.whitehouse.gov/omb/budget/fy2002/mgmt.pdf
- Total Cost of Ownership for IT Management
  http://www.asapsoftware.com/emk/pdf/ASAPeSMART_TCOReview.pdf

SEI Headlines

The United States General Accounting Office

Best Practices Reviews


Computer Security Resource Center (CSRC)

NIST

EXECUTIVE OFFICE OF THE PRESIDENT
OFFICE OF MANAGEMENT AND BUDGET

THE PRESIDENT'S MANAGEMENT AGENDA

FISCAL YEAR 2002

The TCO of
IT Asset Management

ASAP Software

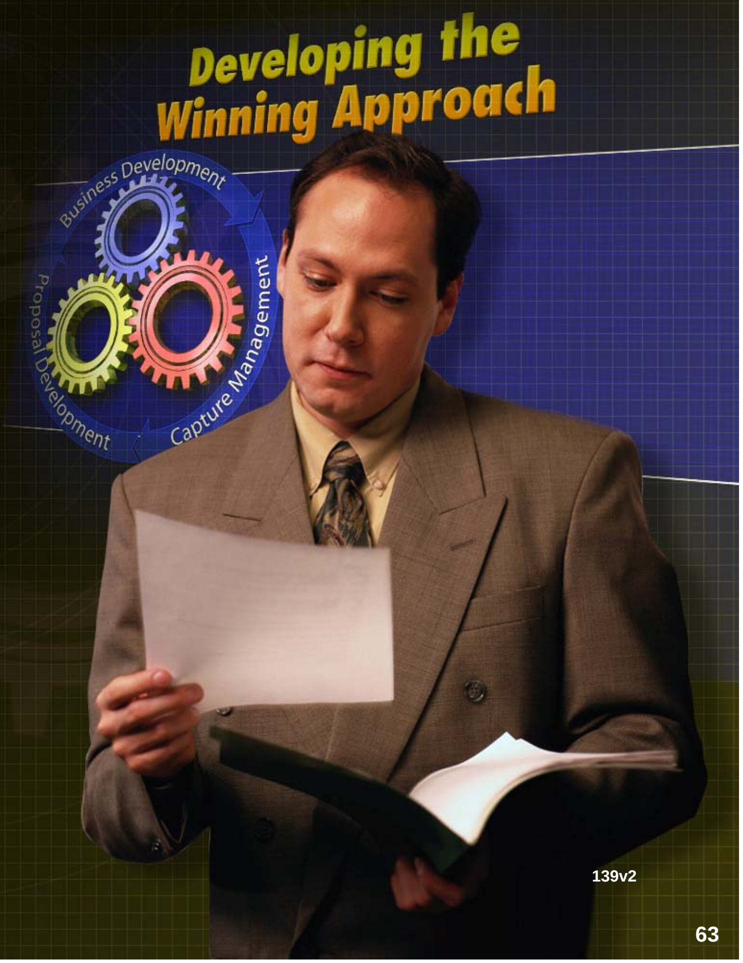
Writing Guidelines and Techniques

- Narrative must contribute to the customer’s rapid comprehension of your qualifications and approach
- Formulate ideas precisely and simply
- Guide the evaluators through your writing
  - Use subheadings frequently
  - Build in graphical roadmaps

Developing the Winning Approach
Business Development
Proposal Development
Capture Ma

Writing Guidelines and Techniques

- Use the *active voice*
- SAY what you mean in simple English
- Keep sentences short
  - Avoid the 85-word sentence
  - Target: <25 words
- Identify tangible benefits of your technical and management approach to the customer


Developing the Winning Approach
Business Development
Capture Management
Proposal Development

Sample Response Structure for the Technical Volume

3.3 TECHNICAL TASK #3

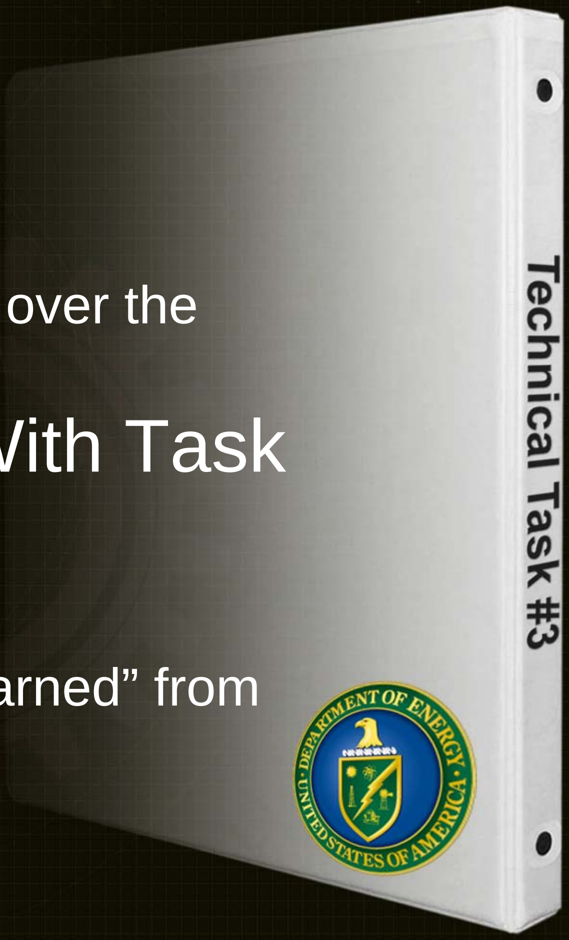
3.3.1 Introduction

3.3.2 Understanding DOE's Requirements and Success Criteria for Task #3
(include how requirements may evolve over the contract lifecycle)

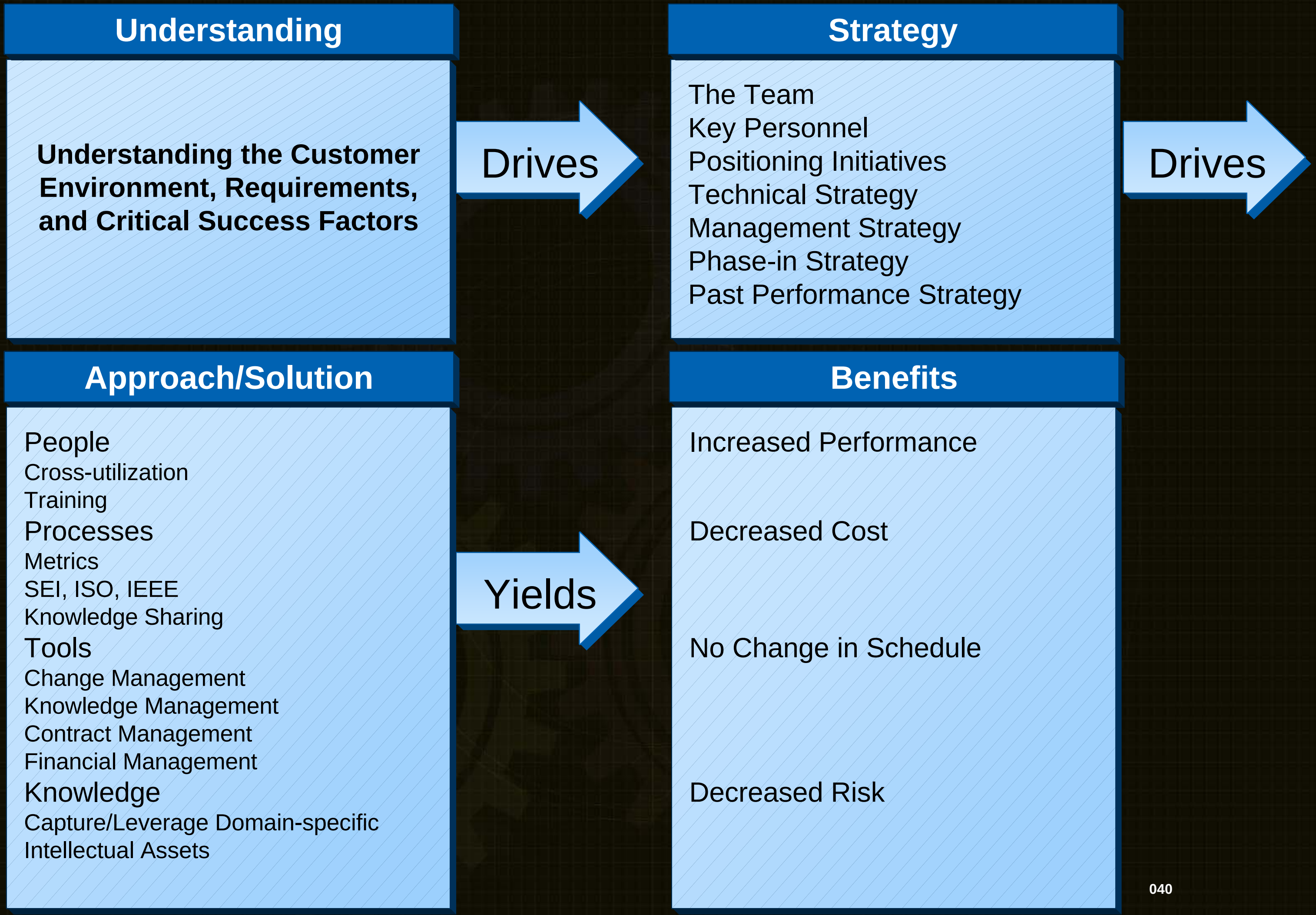
3.3.3 Critical Issues Associated With Task Performance

3.3.4 Our Technical Approach
(include best practices and "lessons learned" from similar contractual experience)

3.3.5 Summation



What Drives What?



Understanding

Understanding the Customer Environment, Requirements, and Critical Success Factors

Drives

Strategy

The Team
Key Personnel
Positioning Initiatives
Technical Strategy
Management Strategy
Phase-in Strategy
Past Performance Strategy

Drives

Approach/Solution

- People
  - Cross-utilization
  - Training
- Processes
  - Metrics
  - SEI, ISO, IEEE
  - Knowledge Sharing
- Tools
  - Change Management
  - Knowledge Management
  - Contract Management
  - Financial Management
- Knowledge
  - Capture/Leverage Domain-specific Intellectual Assets

Yields

Benefits

Increased Performance

Decreased Cost

No Change in Schedule

Decreased Risk

040

Customer-focused, benefits-based solution pathway

Systematic Thinking About Customer Benefits

Writing to Your Audience

Two Audiences

Technical Reviewers

Non-technical Reviewers

Place yourself in the reviewers' shoes

Bring Your Proposal to Life

RSIS

Developing the Winning Approach

Transferable, Action-Oriented Lead Words

- Manages
- Performs
- Implements
- Conducts
- Directs
- Coordinates
- Prepares
- Develops
- Investigates
- Inspects
- Negotiates
- Reviews
- Writes
- Designs
- Supports

Meaningful Descriptions

- Rigorous Development Approach
- Principled Management
- Seasoned Field Technicians
- Creative IT Solutions
- Comprehensive Community Relations Plan
- Demonstrated Success in Providing Superior Value Engineering
- Results-oriented Project Team
- Innovative Network Engineering Methodologies

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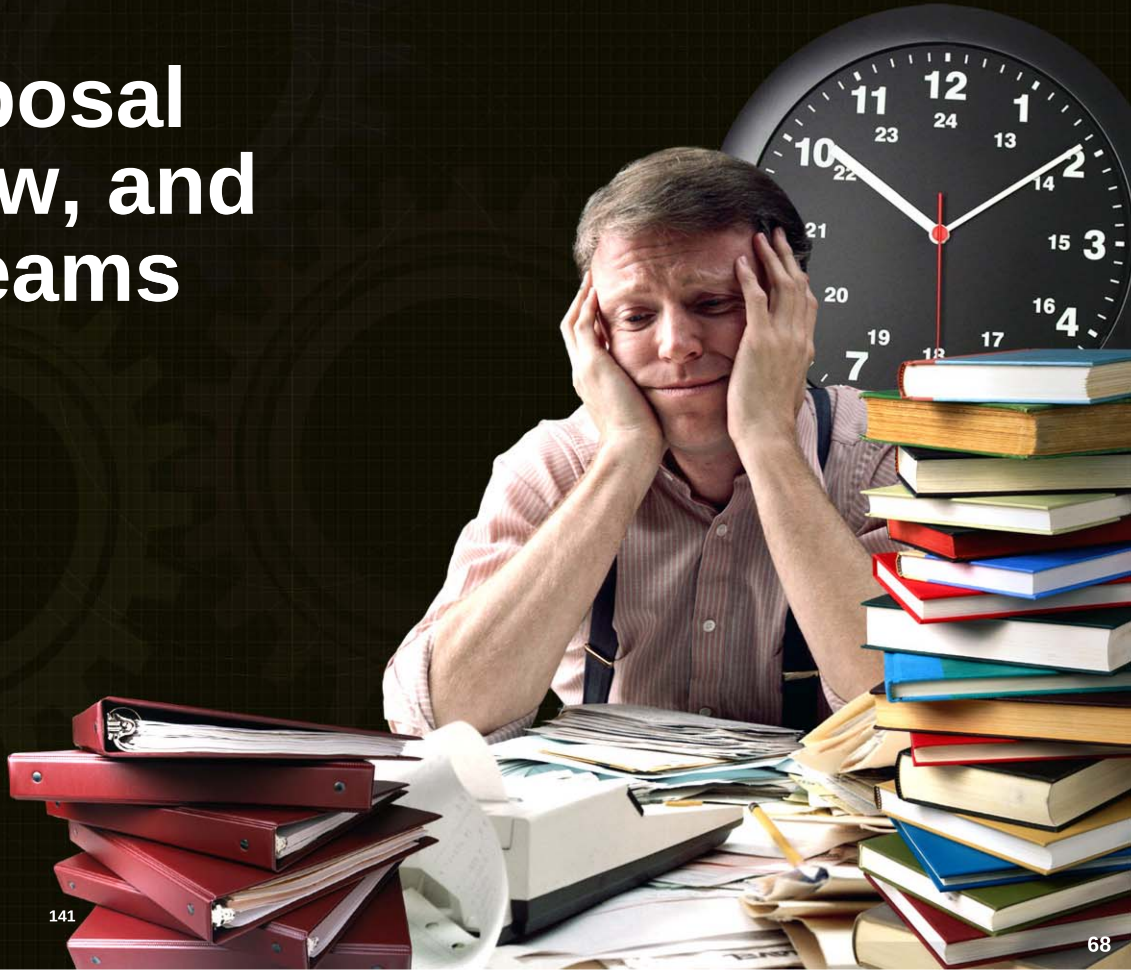
Check for overuse of your company's name

Control Schedule Relentlessly

Developing the Winning Approach

Proposal Development

Give the proposal writing, review, and production teams enough time



Freeze the Document

Technical Proposal

So it can be produced and QC'ed with time to spare

Move Beyond

Move Beyond
Customer Satisfaction!

To Customer Enthusiasm!

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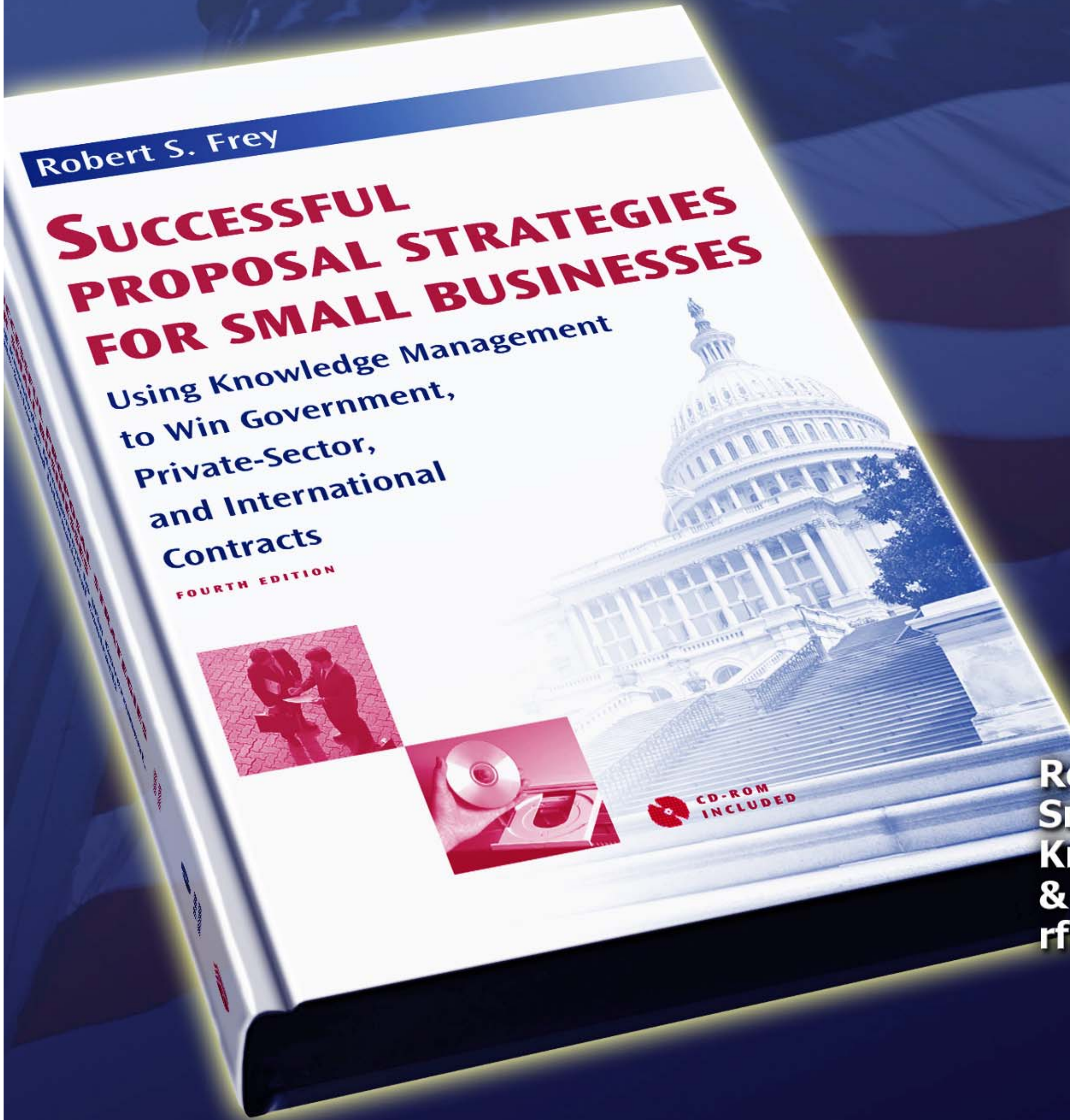
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